

This book on Cluster Development is basically a narration by the author of his project journey wherein he prepared a frame work for an industrial cluster based in Haryana state of India to explore business opportunities in another state of India called Gujarat. This book has presented the theory of cluster development in a very practical manner it is practical because here the information has been documented in steps through which the author himself passed when he started to work on this project. As a management scholar and practitioner one can infer the basic and practical understanding of certain management concepts like B2B Business, Strategy for expansion, Development Communication, Marketing and overall Cluster development from this book. Cluster Development is a positive step in the direction of Make in India because there is a need for Indian industries to get robust and integrated.



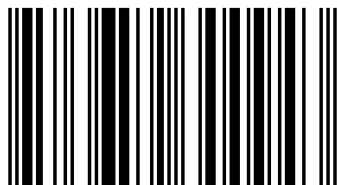
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Cluster Development: A Research Journey of Taking Foundry to Dairy

How One Industrial Cluster Explored Opportunities in Gujarat (India) Dairy Sector



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Cluster Development

(A Research Journey of Taking Foundry to Dairy)

How One Industrial Cluster explored Opportunities in Gujarat (India) Dairy Sector



PRASHANT PAREEK

Dedicated to My Father Mr Nandkishor Pareek My Mother Mrs Shakuntala Pareek My Wife
Naina and lovely Siblings Sweta and Diwakar

Cluster Development
(A Research Journey of Taking Foundry to Dairy)

How One Industrial Cluster Explored Opportunities in Gujarat (India) Dairy Sector

PRASHANT PAREEK

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Foreword

The success of any economy depends on the viability of corporations. India has number of flourishing, efficient, highly competitive corporations but it still needs a strong push up and impetus to grow. To survive and thrive, an economy needs to encourage the development of new enterprises; these new enterprises not only boost a sentiment for entrepreneurship in the country but also play a pivotal role in generation of employment.

Small scale enterprises of India has significant contribution in the areas like export, employment, and of course contribution in GDP of Indian economy, post independence government of India has perpetually paid attention towards the development of small scale units in its industrial policies and schemes.

Business organizations today in India that is streamlined, professional and competitive, on a worldwide basis, with a best in their sector see rich pickings ahead. If small scale industries get support from various agencies like government, NGO's and educational institutions then one can expect a robust and integrated development of these units which can ultimately lead to the growth of our gross domestic production.

This book on **Cluster Development** is basically a narration by the author of his project journey wherein he prepared a frame work for an industrial cluster based in Haryana state of India to explore business opportunities in another state of India called Gujarat. This book has presented the theory of cluster development in a very practical manner it is practical because here the information has been documented in steps through which the author himself passed when he started to work on this project.

As a management scholar and practitioner one can infer the basic and practical understanding of certain management concepts like B2B Business, Strategy for expansion, Development Communication, Marketing and overall Cluster development from this book.

Cluster Development is a positive step in the direction of Make in India because Indian industries are getting robust and integrated.

Prof Alan D' Souza

Founding Director (Mudra Institute of Communication, Ahmedabad)

Former President of Alumni Association (Indian Institute of Management, Ahmedabad)

Former Dean (Goa Institute of Management, Goa)

Founding Dean (Shanti Business School, Ahmedabad)

ACKNOWLEDGEMENTS

This Book has been written over a period of Four years. The journey started in June 2012 when i got this project of cluster development by Micro Small and Medium Enterprise (MSME) Foundation, New Delhi. I was Associated with Kamma Incorporation (An International Marketing Consultancy based in Ahmedabad)

After getting this assignment of creating a base for an industrial cluster to foray in an absolutely new market beyond its geographic location and demographic comfort i personally during the course of my study got the opportunity to obtain clarity on many concepts in various disciplines like rural dynamics, cultural dynamics, development communication, marketing, strategy and of course cluster development.

It has been of enormous benefit to me to have had the opportunity to work alongside some of the most talented professionals from India and specifically from Gujarat state. I am keenly aware that this is a privilege and an opportunity that many have not enjoyed.

This book would not have been possible without a number of contributions and i want to ensure that generous praise and thanks are extended to them. The first is Mr Mignesh Parekh, Founder and CEO of Kamma Incorporation who had given me this opportunity to work on the project of this magnitude. Secondly Mr Palvinder Pal, Director of MSME Foundation, New Delhi who worked and guided me closely over these years.

Thirdly, all the managers of District dairies in Gujarat state who spared their precious time for interview and meeting with Samalkha industrial association representatives. Last but not the least all the farmers from 180 villages of Gujarat state who shared their concerns and views on the usage of chaff cutter machine.

Of course any errors or inaccuracies in this book are mine and mine alone, and i must add that the views promoted in this book are my own which are based on my observations and research on the field during interviews and surveys.

Why This Book

In Haryana state of India there is a District called Samalkha which is around 70 km away from the national capital of India Delhi, in this district there are 30 to 32 foundries (Small Scale Units) which are in the business of manufacturing chaff cutter machines. Department of science and technology, government of India and MSME foundation is running cluster development programme since 2011, initially MSME helped these foundries in technology innovation, product innovation and also in expansion in other states of India like Madhya Pradesh, Uttar Pradesh, Rajasthan etc. In the year 2012 MSME and Samalkha industrial association decided to explore opportunities in Gujarat market.

I was a part of this project which was full of learning outcomes for me as a management faculty and therefore i feel glad and privilege to share my learning's with the readers. I have tried to keep this book in the same form and steps in which the research was being conducted in order to provide the readers with the actual feel of my research journey and learning.

Traditional foundries of Samalkha are almost as old as our independence. These foundries started manufacturing chaff cutter and gradually diversified into many other products and part of machinery i.e. cane crusher, valves for pumps and pulley for electric motors. Over a period of time chaff cutter & crane crusher became main product of Samalkha.

Most of the Samalkha products are sold in local market of Haryana and some are selling in other markets of India like Gujarat, Madhya Pradesh, Maharashtra and Karnataka. Some units are also indirectly exporting chaff cutters via merchant exporters in Ahmedabad and Mumbai.

Since the local demand for the chaff cutters manufactured by Samalkha cluster are stagnant and also facing competition from nearby markets of Goraya and Batala in Punjab, it is high time to explore further markets. Markets like Gujarat, Maharashtra, Madhya Pradesh and Karnataka are highly potential and yet untapped.

Gujarat has very developed and matured milk industry including famous AMUL brand. There are 16 district cooperative dairies covering almost whole Gujarat region with respect to Milk production. There are approximately 18,000 plus milk societies connected with these dairies and around 3 million members are associated with the milk societies. These 3 million plus

milk producers are holding around 5.5 million milk producing cattle. With these Gujarat alone is producing almost 7.7% of total milk produced in India.

Traditional way of feeding cattle in Gujarat is different than northern part of India where milk producers serve small pieces of grass using chaff cutters whereas in Gujarat 8 feet long grass is cut into 4 portions and offered to cows and buffalo. There is very less awareness about chaff cutters, its usage and benefits of using small pieces of grass to feed the cattle. Also with compare to north region, Gujarat farmers are lazy and do not prefer to do hard work. Secondly, the feeding grass is available throughout the year and thus the farmers are little less worried about the wastage by offering long length of grass to cattle.

Slowly the awareness of chaff cutters is increasing and farmers have also started taking care about wastage of grass. Dairies also are taking keen interest in promoting chaff cutters amongst their milk societies and some of them are also offering subsidy to the members interested in purchasing chaff cutters.

Since the demand is increasing day by day for chaff cutters in Gujarat, Samalkha is finding an opportunity to propose their products to the Gujarat market. There is hardly any big time industry or manufacturers in Gujarat involved in manufacturing of chaff cutters. There are few local manufacturers those who are catering the local demand of chaff cutters and some from Punjab are also present in Gujarat.

Market research report of Gujarat has revealed that there is hardly any awareness about Samalkha and its products, but the positive aspect of Gujarat market is that there are hardly any big competition from the local supplier or the competitors of Punjab. Most of the time milk dairies are directly buying from the manufacturers and supplying it to the members along with the subsidy.

Gujarat being untapped market, Samalkha has golden opportunity to expand their reach to such prosperous market and develop its strong presence that can lead to further expansion to the nearby markets of Madhya Pradesh and Maharashtra.



1 INTRODUCTION

Small enterprises have been the engines of economic growth around the world as they are an important source of inventions and innovations. Similarly in India also SMEs play a vital role in the Indian economy, and are receiving increased attention and support.

Department of Science and Technology (DST), Ministry of Science & Technology has initiated a “Programme on Innovation Cluster” (PIC) with a vision to promote collaborative research, development and commercialization among MSME (Micro Small Medium Enterprise) cluster to promote production of high value goods and services using the innovative route. The project aims to support the Indian industry to move up the knowledge pyramid and operate at the frontiers of knowledge.

Investment in knowledge creation, acquisition, absorption and diffusion is critical for this purpose. This project aims to promote collective research and learning in horizontal and vertical clusters by facilitating linkages among enterprises with knowledge institutions to develop new and value added products aims at national and global markets. It is an action oriented project that builds on the best practices around the world and the foundation’s in-house competence to foster cluster based MSME development.

Under the project “Promoting Innovation Cluster” a preliminary visit to Samalkha chaff cutter was initiated by the implementing agency to carry out the Rapid Diagnostic study report with the help of local association to understand the current scenario of the cluster.

1.1 Cluster Development in Gujarat

[Table-I Types of Clusters and Geographical Area in Gujarat]

| Type of Cluster | Location |
|------------------------|---|
| Brass Parts | Jamnagar |
| Castings & Forgings | Ahmedabad, Bhavnagar, Jamnagar, Rajkot, Vadodara, Anand |
| Ceramics | Morvi, Thangadh, Himmatnagar, Ahmedabad |
| Chalk Industry | Porbandar |
| Common Salt | Anjar, Gandhidham, Dasada |
| Dyestuff | Ahmedabad |
| Data Processing | Ahmedabad, Surat |
| Diamond Processing | Ahmedabad, Surat |
| Fabrication | Ahmedabad, Vadodara |
| Fish Processing | Veraval |
| Machine Tools | Rajkot |
| Oil Engines | Rajkot |
| Power driven Pumps | Ahmedabad, Mehsana |
| Re-rolling Mills | Bhavnagar |
| Textiles | Ahmedabad, Dholka, Surat |
| Textiles-Ginning | Ahmedabad, Manavadar |

| | |
|------------------------|----------------------------|
| Textiles- Printing | Jetpur |
| Textiles-Khadi | Wadhvan |
| Textiles- Finishing | Bhuj |
| Textiles- Synthetic | Surat , Mangrol |
| Jari-Printing | Surat |
| Textiles-Power loom | Ahmedabad, Surat |
| Readymade Garments | Ahmedabad |
| Textile Stores | Ahmedabad, Surat , Wadhvan |
| Utensils | Ahmedabad, Vadodara |
| Wood based | Nadiad |
| Book Publishing | Ahmedabad |

[Table- II Clusters Taken for Development by Various Institutions in Gujarat]

| Sr. No. | Cluster | Location | Institution |
|----------------|---------------------------|-------------------------|--------------------|
| 1 | Ceramics | Morvi & Thangadh | CGCRI |
| 2 | Power loom | Ahmedabad | ATIRA |
| 3 | Submersible Pump Industry | Ahmedabad & Mehsana | ERDA |
| 4 | Ceramics | Himmatnagar & Ahmedabad | CGCRI |
| 5 | Brass Parts | Jamnagar | EDI |
| 6 | Jewellery | Ahmedabad | NIFT |
| 7 | Garment | Ahmedabad | NIFT |
| 8 | Salt Industry in LRK | Surendranagar | CSMCRI & SEWA |
| 9 | Fish Processing | Veraval | CEPT |
| 10 | Re-rolling Mill Industry | Bhavnagar | GITCO |
| 11 | Chalk Industry | Porbandar | GITCO |
| 12 | Ginning Industry | Ahmedabad | ATIRA |
| 13 | Gold and Jewellery | Rajkot | NIFT |
| 14 | Dyes & Dyes Intermediate | Naroda, Ahmedabad | GCPC |
| 15 | Pharmaceuticals | Ahmedabad | PERD |
| 16 | Plastic Processing | | CIPET |

| | | | |
|----|---|---------------------------------------|------------------|
| | Trainings | | |
| 17 | Foundry | Ahmedabad | GITCO |
| 18 | Salt Industry | Rajkot | CSMCRI ANANDI |
| 19 | Common Facility Centre for Diesel Engine Research | Rajkot | EDI |
| 20 | Engineering at Makarpura | Vadodara | EDI |
| 21 | Facilitating survival and growth of existing enterprises in the textile accessories and machinery | Ahmedabad, Surat and Surendranagar | EDI |

2 RESEARCH METHODOLOGY

2.1 Research Objective:

- To analyse the current system and identify the gaps therein
- To understand from end users the reason for using/ not using the chaff cutters
- To analyse the reasons for low demand of chaff cutters in Gujarat despite large cattle population and agricultural land
- Positioning Samalkha to identify its current market share of chaff cutters
- To identify whether there is requirement for improvement in features of the existing product or there is a need to develop a new product and ensure that there is no communication gap between the stakeholders

2.2 Scope of the study:

This study is carried out to understand the demand and supply situation of chaff cutters in Gujarat and also to identify the existing as well as potential market demand of the chaff cutter in Gujarat. We have conducted market research of Dairies and Milk societies located in 13 different districts of Gujarat including Ahmedabad, Anand, Surendranagar, Godhra, Junagadh, Baroda, Bharuch, Surat, Valsad, Gandhinagar, Mehsana, Himmatnagar & Palanpur

2.3 Research Process:

Following are the steps for Market Development Assistance:

Step 1: Literature Review

We started our primary research after reviewing the following literature:

- Report prepared by MSME foundation, New Delhi for Samalkha cluster development
- Website of Samalkha Industry Association
- Brochures of chaff cutter manufacturers in Ahmedabad & Samalkha
- Government AFDP scheme guideline

Step 2: Formulation of Questionnaire

After referring the secondary data we understood the scenario of chaff cutter in Gujarat & according to these we had prepared the questionnaire for Dairy & Milk society of Gujarat region. We had prepared the questions regarding chaff cutter awareness & also about the government scheme called AFDP (Accelerated fodder Development Programme) in which government is providing 75% subsidy to farmers whose who buy chaff cutter.

Step 3: Collect the data by visiting dairy & milk society

After preparing the questionnaire, we had visited 13 District of Gujarat: Ahmedabad, Anand, Surendranagar, Godhra, Junagadh, Baroda, Surat, Bharuch, Valsad, Gandhinagar, Mehsana, Himmatnagar and Palanpur.

In these districts, we had visited Milk Dairy of each district & understood their requirement & current scenario of chaff cutter & also about subsidy scheme.

We have visited 15 milk societies under each Milk Dairy to identify their need about chaff cutter & also awareness about the chaff cutter features & benefits.

Step 4: Strategy formulation

After collecting the data through questionnaire, we have analysed the data and prepared pie-charts. These data were collected through personal interview of the employee of Milk dairies & secretary or chairman of Milk societies of 13 district of Gujarat. On the basis of our analysis of the data, we have prepared the strategy for the Samalkha cluster to enter in to the Gujarat market to promote their product i.e. Chaff cutters.

Step 5: Presentation of Strategy

After preparing the strategy, we presented the same to the members of Samalkha Industrial Association & Foundation of MSME Cluster at Samalkha town (Haryana). We had explained in details about the findings of Gujarat market and current situation about the chaff cutter & its awareness in Gujarat.

On the basis of our findings, we have suggested the market entry strategy for the Samalkha products to enter into the Gujarat market. Samalkha industry association positively accepted our entry strategy and suggestion to explore the Gujarat Market.

Step 6: Execution of Strategy

Once the Samalkha Industrial Association (SIA) approved the strategy suggested by us to enter in to the Gujarat market, we prepared a plan to organize Buyer-Seller Meet for SIA in Gujarat.

We had arranged the meeting between 8 Milk Dairies & Samalkha Association for business opportunities and for that we invited SIA members to Gujarat.

Step 7: Outcome and major breakthrough of B2B meeting

The B2B meetings between SIA & Milk Dairies in Gujarat were very successful.

Major discussion points of the B2B meetings were as follows:

- Awareness / Demonstration at Village Level
- Good Quality Product with additional safety features
- After Sales Services

Major Breakthrough of B2B meetings:

- Banas dairy has given trial order of 150 hand operated chaff cutters and already the specifications are sent to SIA
- Amul dairy seems to be very positive about the chaff cutters promotion in Amul and conceptually they have agreed to do joint activities for promotion of chaff cutters

- Sumul dairy, Surat is very much interested to buy SIA products if they make some changes in the machine like adding Gears and machines covered for the safety aspects
- Bharuch dairy is expecting big demand of 1000 motor operated chaff cutter which they will source through NCCF
- SIA needs to get approved their products at NCCF and that will give them advantage at the time of supplying of chaff cutters at Bharuch and Ahmedabad dairy
- There are certain changes which SIA needs to do in their product with respect to its look, functionality and safety aspects and after that only they can get better positioning in Gujarat market
- Mr. Rashmin Chauhan was part of one group which has visited Banas, Surendranagar, Himmatnagar and Ahmedabad dairy. SIA members found him fit to start working for SIA in Gujarat

Step 8: Final report

After meeting with all members of Milk dairy, Milk society, Samalkha Association & MSME Cluster, we have prepared the report on ***“Market Development Assistant to Enter Gujarat Market for the Chaff Cutters of Samalkha Cluster”***.

Few highlights of the report are as follows:

- According to these market research we conclude that in Gujarat, awareness of chaff cutter is very low
- But after knowing its features & benefits members of milk dairy & milk society are ready to buy the chaff cutter
- Because due to usage of chaff cutter milk productivity will increase & wastage of fodder grass will reduce
- This will give direct effect on economy of members those who using it.
- In Gujarat, demand for chaff cutter is very high & if suppliers want to sustain here for longer time period than along with good quality, they have to provide the after sales service
- Through after sales service, whenever users get any trouble shooting while using it, the representative reach the customer's door step and solve the problem of the chaff cutter

2.4 Methods of Data Collection:

Sampling

[A] Sample Size: 13 Dairies of Gujarat region and 180 Milk Societies which are registered under these dairies.

[B] Sample Unit: Dairy representatives and milk society secretary or chairman.

[C] Sampling Technique: Our sampling technique is non- probability sampling with convenience sampling technique.

Data Collection Sources

Two methods were used to conduct a study on chaff cutters. This study is synthesis of Primary data as well as Secondary data.

Secondary Data:

The secondary data was collected to mainly understand the demand of chaff cutter in Gujarat, the parameters are as follows:

- Report prepared by MSME foundation, New Delhi for Samalkha cluster development
- Website of Samalkha Industry Association
- Brochures of chaff cutter manufacturers in Ahmedabad & Samalkha
- Government AFDP scheme guideline

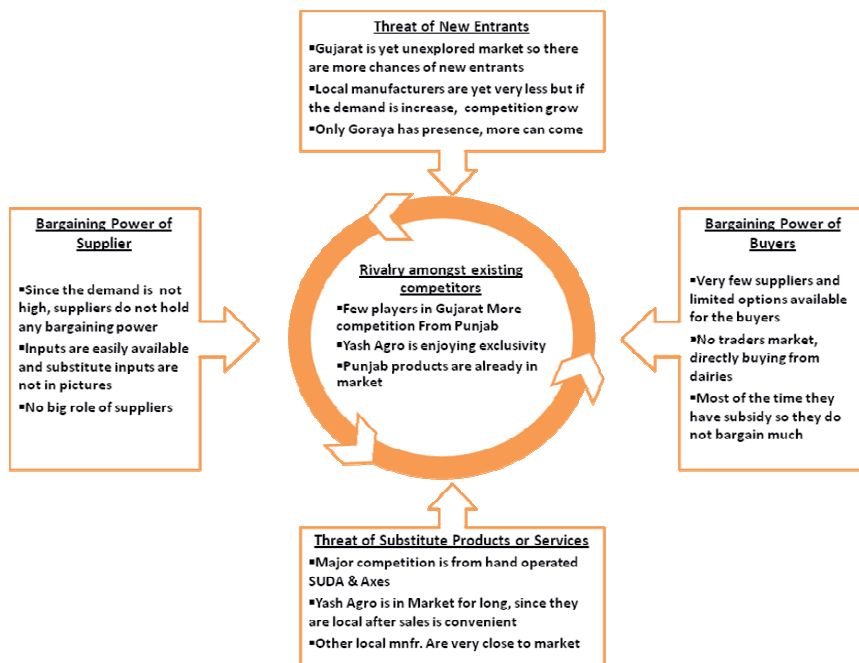
Primary Data:

Primary information was collected through personal interviews of the dairies and milk societies at 13 different districts of Gujarat to understand the current scenario of chaff cutters. This data collection tool was also utilised to create awareness amongst prospective users of chaff cutter about the benefits and usability of chaff cutters.

Tool: Questionnaire

2.5 Data Analysis

Porter's Five Forces



- *Rivalry Among Existing Competitors*
- *Threat of New Entrants*
- *Threat of Substitute Products or Services*
- *Bargaining Power of Suppliers*
- *Bargaining Power of Buyers*

[1.] Rivalry among Existing Competitors

- There are very few players in Gujarat, Yash Agro (Ahmedabad), is one of the big where as rest are small in size i.e. Aryan Work (Jasdan), National Agro (Kalol), Girnar Work (Girnar)
- There are some Punjab suppliers are supplying to Gujarat like Goraya (Punjab), Raja Toka (Punjab), Payal (Punjab)
- The rivalry among the exiting firms are not intense in Gujarat markets since demand is not so high due to less awareness
- Considering the above facts, It seems to be good opportunity for Samalkha that there huge market potential with less competition

| No. | Name Manufacturer | Price Range of the Chaff Cutter (Rs.) | | After Sales Service |
|-----|----------------------|---------------------------------------|---------------|---------------------|
| | | Motor Operated | Hand Operated | |
| 1 | Yash Agro, Ahmedabad | 20,000 | N. A. | Providing |
| 2 | Jasdan Mfg, Rajkot | 14,000 | N.A. | Not providing |
| 3 | Punjab Suppliers | 13,000 | N.A. | Not providing |
| 4 | Samalkha Industry | 8,000 | 4,000 | Not providing |

[2.] Threat of New Entrants

- So far there is less competition since the demand is less. If the awareness is created the demand will surely increase and due to such increased demand, more competitors will enter the market to en-cash the demand.
- So far only Yash Agro (Ahmedabad) is enjoying the exclusivity in the market and holds major chunk of the market. Others are the smaller one and some Punjab based suppliers are active in the market. More such suppliers evolve if the demand will exist

[3.] Threat of Substitute Products or Services

- Main substitute of the chaff cutter is traditional hand operated cutter (Local language they call is SUDO).
- Some use Axe to cut the grass before offering to cattle
- Other threat in terms of services are that Yash and other small time suppliers are local so they can provide better after sales services

[4.] Bargaining Power of Suppliers

- The bargaining power of supplier is low since the demand is less and material to manufacture chaff cutter are easily available.
- There is no big role of suppliers

[5.] Bargaining Power of Buyers

- There are very few suppliers so the buyers are having very less option available to buy chaff cutters
- Most of the time end user buys chaff cutters from dairy by using subsidy offered by the dairy. Since only dairy is the biggest source of supply, users will have to accept what dairy have selected
- Dairy are also not aware about the different options since very less number of chaff cutter manufacturers are in existence in Gujarat market
- Considering above facts, buyers does not have much bargaining power with respect to chaff cutters

2.6 Limitation

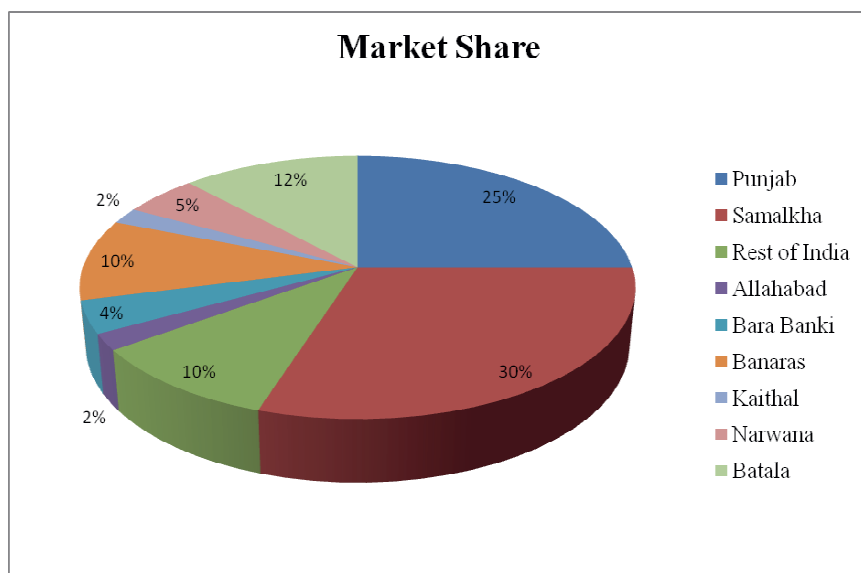
In every district, there were on an average 1000 milk society out of which we covered 15 in each district and prepared our report so the constraints were of resources & selecting the judgment samples.

3 INDUSTRY PROFILE: CHAFF CUTTER INDUSTRY SCENARIO

3.1 Major Players & its Market Share:

- Samalkha Industrial Association, Samalkha
- Goraya, Punjab
- Yash Agro, Ahmedabad
- Jasdan, Rajkot
- Allahabad
- Bara Banki
- Banaras
- Kaithal
- Barwana
- Batala

(Source: MSMSE Report 2012)



3.2 Growth of Samalkha

Samalkha is a small town in the district of Panipat (Haryana). The town is well known for its foundry Cluster in the region. The cluster was developed in late 40s and early 50s. In 1949 a family of local traders brought this business to this town. The migrated trained workers transferred their technical knowhow from Goraya (Punjab). In the due course of time the number of units started growing along with the growth and bifurcation of this family. The story of the development of small units belongs to two brothers and their spouses who were working as in charge in foundries elsewhere. In 1968 they came back to their town and started a small casting unit with a crucible. They slowly grew to five small units with small size cupolas. They introduced green sand casting with small size handy cupola. These cupolas can be charged almost every day with a capacity of 0.5 to 3 M.T. They started addressing the demand which was unattended by the big units i.e. the casting of machinery parts, motor casings, pumps parts etc. Slowly they grew as units which can address the immediate needs with quality product.

Over a period of 60 years the cluster has witnessed many ups and downs. Starting with the production of **chaff-cutting machine, Toka Machine, Haryana Toka Machine** the cluster has introduced many products in its basket such as cane crushers, valve for pumps and pulleys for electric motors. To its parallel the small units which started with brass and gunmetal parts for cane crushers and chef cutters started running cupolas of small sizes and introduced new products in the cluster such as hand pump fittings, submersible pump bodies and electric motor casings etc. In 1991 started the new era of globalization and change in the policy of the central government to decontrol the supply of raw materials such as pig iron, steel and coke. Many units who were surviving on permits and quotas of raw materials vanished from the scene and number of units in the cluster reduced drastically in nineties.

Geographical Location

Samalkha is situated on the national highway number one and is just 75 K.M away from the national capital Delhi in its north. The town is very well connected with the rail and road network. On the eastern part it is connected with UP which is just 25 K.M away across the famous river Yamuna. On its other sides it is connected with the other districts in Haryana like Sonapat, Rohtak, Jind and Karnal. The town is the central point of around 60 surrounding villages and is a big marketing centre for them. It has a very big grain market with all the

modern facilities as well as the largest mandi for jiggery. The jiggery is produced in bulk in this region as well as in the adjoining areas of western UP.

The above table shows that the output of the cluster has grown at about 8 to 10% per annum and its turnover has almost more than doubled in last four years. According to an estimate average production capacity of the big units is 250 M.T per month and these units are actually operating at 50% of their installed capacity only.

3.3 Overview of Chaff Cutter

Definition:

Chaff cutter is a mechanical device for cutting straw or hay into small pieces to feed the livestock. It is generally used to chop dry or green fodder of bajra, juwar, and com, bar seem, sugarcane, paddy, grass, groundnut etc. This aids the animal's digestion and prevents animals from rejecting any part of their food.

History & Evolution:

The business of chaff cutter began in late 15th & early 16th century in central Europe & it was introduced in England during 17th century. Despite being aware for 200 years of the method of feeding cattle's with finely chopped straw no public interest was shown in the subject until the mid 18th century.

In Australia, chaff cutter was a much needed fuel as petrol is today when the horse was the primary source of power & transport between the late 19th century & the end of Second World War. Over the next three decades the tractor gradually replaced them. The most convenient form of feed was to cut hay into chaff & then mix it with other grains such as oats.

After independence in 1947, started an era of five year plan. With a greater emphasis on the development of agriculture sector by the Govt of India & the growing demand of farmers for mechanization in 1960, the manufacturing bullock driven chaff cutters was started & later on in 1970 chaff cutters cum thresher was developed.

With the existence of green revolution in 1966, India became a self reliant country in food grains which marked a real beginning of mechanization of agriculture sector in India. Therefore, continuing the policy of advancement & up gradation in existing products,

different models of chaff cutter was introduced like steel gear models of chaff cutters thus expanding their existence in India & abroad. Different models of chaff cutters have been introduced since then.

Chaff cutters are not only produced in India but also in other parts of world like Europe, china, Australia etc.

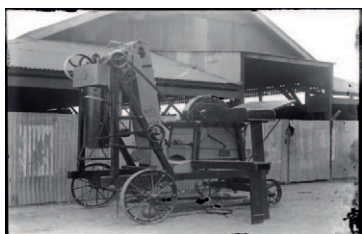
3.4 Evolution of Chaff Cutter:



(1610-1630)



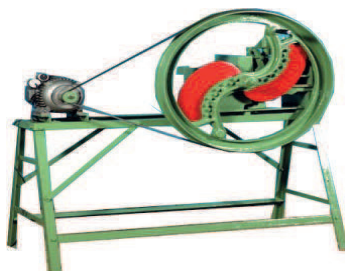
(1659)



(1917)



(At Present, Hand Chaff Cutter)



(At Present, Machine Chaff Cutter)



(Keyng, Chinese Chaff Cutter)

Types of Chaff Cutter

Chaff cutters are usually divided into hand driven & power driven to cut fodder for animals. This is used in many houses in rural areas. This product is in great demand in these houses as this is the necessary item to be gifted in the girl's marriage in many villages in north India.

Chaff cutter is an agricultural implement used to cut fodder (Chaff) into small pieces. This operation can be done manually (Hand operated) or by a power drive (Motor driven).

In case of Hand driven cutters, two persons are required at a time-one to feed the chaff & the other to drive the pulley. Motor driven models require only one person to feed the chaff, while the pulley is driven by the electric motor. Provision is available in motor driven models for manual operation, when required.

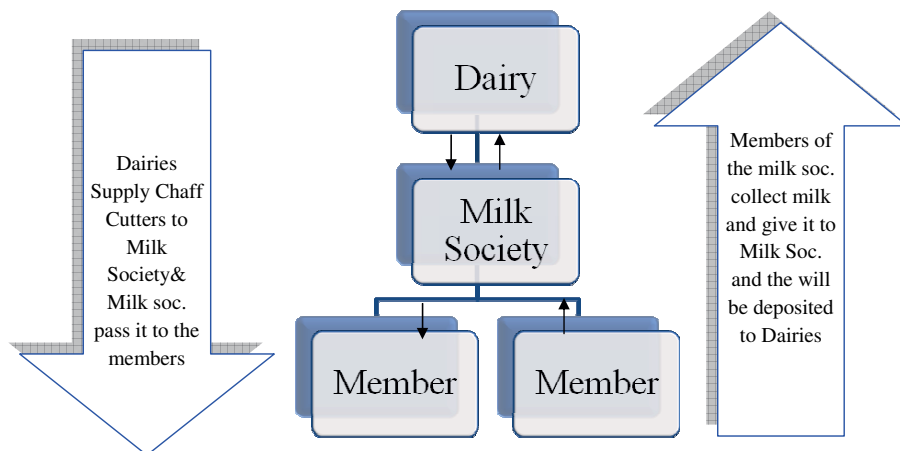
Chaff cutters are available in different local brand names. This is mainly due to local market, local manufacturers & local supply system. This as a whole represents unorganised system of marketing where the manufacturers are unaware about the needs of the market. Maximum quantity of Chaff cutters are produced in Samalkha, Goraya, Narwana & Batala.

4 Gujarat Dairy Sector: A Brief Overview

Gujarat State is situated in western India, surrounding by Arabian Sea in west& south where as by the states of Rajasthan, Madhya Pradesh & Maharashtra in north.

Dairy farming in Gujarat has vital role in providing not only nutritional security but also income and employment to large segment of rural people of the state. India is the largest Milk producer country among the world which is the prestigious matter for the country while Gujarat state has remarkable 5th rank with 7.73% contribution in total Milk production in all over the country for the year 2008-09.

In Gujarat, there are major 16 Dairies and out of which we have visited 13 dairies. As per our survey data, 13 dairies which we have visited are collecting 81,51,950 litres of milk per day, so average each dairy is collecting approximately 6,27,000 Litres of milk daily. Maximum milk is collected from districts of North Gujarat like Palanpur, Himmatnagar, Mehsana & Gandhinagar. There are around 13,064 Milk Society are registered under these 13 Dairies and approximately 24,18,642 individual members active under these Milk societies. Approximately there are around 49,05,000 Cattles in 13 districts.



5 THEORETICAL ASPECTS OF STUDY

Project work of this magnitude always requires many aspects to be covered with proper usage of different theoretical and technical tools. Our Project is a live project under which the market development theory was of prime use for us.

Samalkha a small cluster that wants to start its operations in Gujarat region but it does not know the formal channel to roll in the Gujarat market and this problem was being solved by the hired marketing consultant “The Kamma Inc”. Detailed research of the 13 districts of Gujarat was being undertaken by us to explore the opportunity and to identify the demand supply gap.

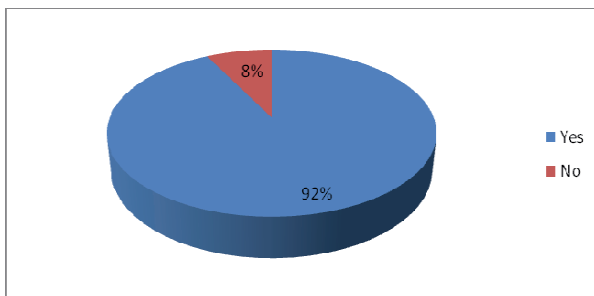
The different theoretical aspects which were covered under this research are as under:

- Understanding of marketing channel.
- Porters five force analysis
- Trend analysis
- Market research theory
- Understanding of the B2B match making mechanism
- Consumer awareness
- Branding and promotion
- Competitors analysis
- Customer preference
- Manufacturing process
- Development Communication

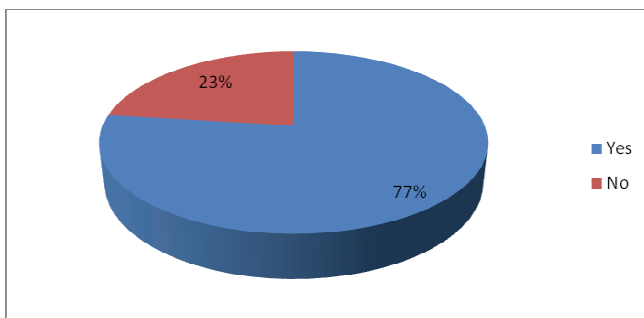
6 DATA ANALYSIS OF MARKET SURVEY

Milk Dairies:

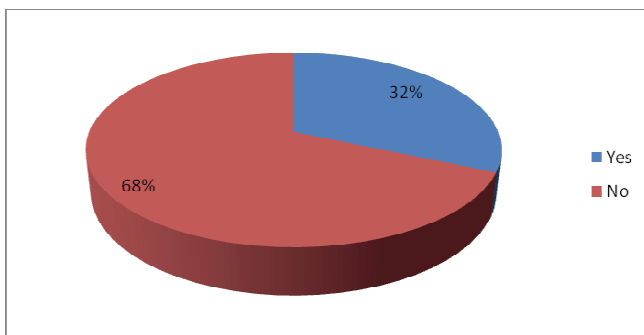
1. Do the members of your milk societies use the chaff cutters?



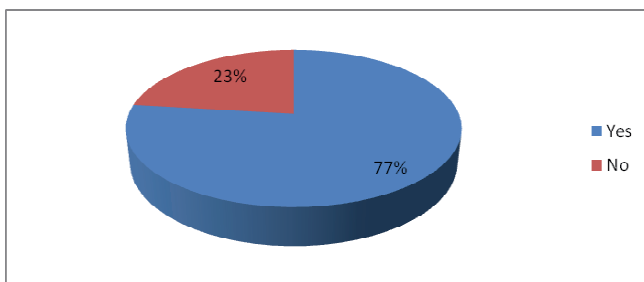
2. Are you aware about RKVY / AFDP scheme of Govt. of India?



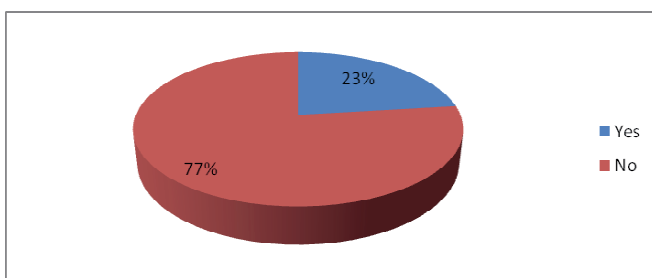
3. Do the members of your milk societies aware about AFDP scheme?



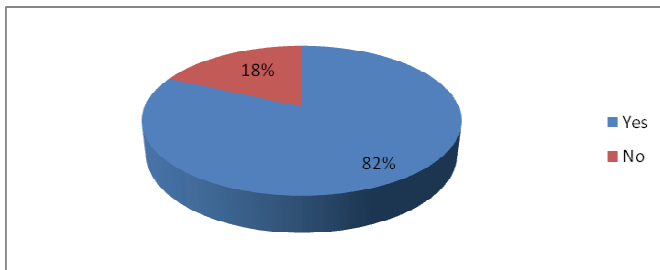
4. Do you run any awareness campaign for AFDP?



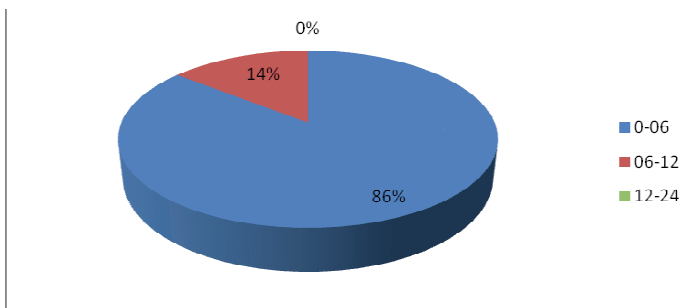
5. Do you require any additional support to run awareness on AFDP for your soc.?



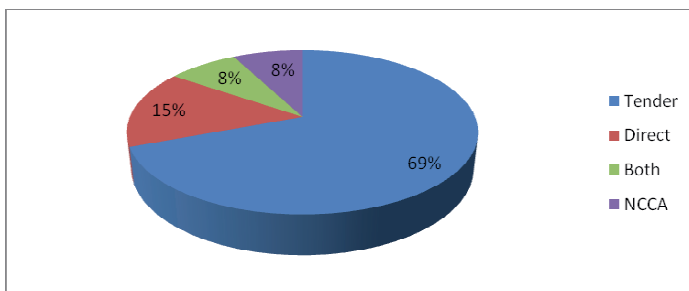
6. If you are aware about the AFDP scheme than have you ever applied for the subsidy from the govt under AFDP for chaff cutters?



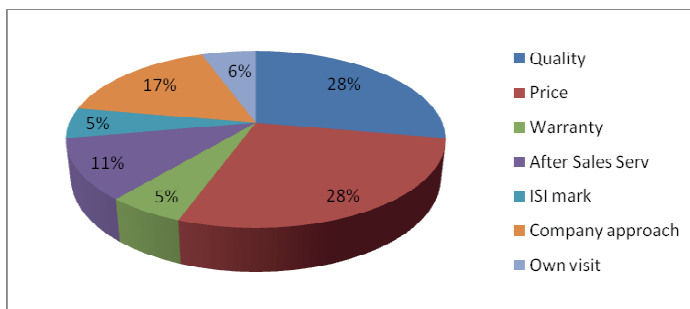
7. If yes and if you have already applied and received any support, can you advice, how much time it required clearing the subsidy amount from the govt? (Days / Months)



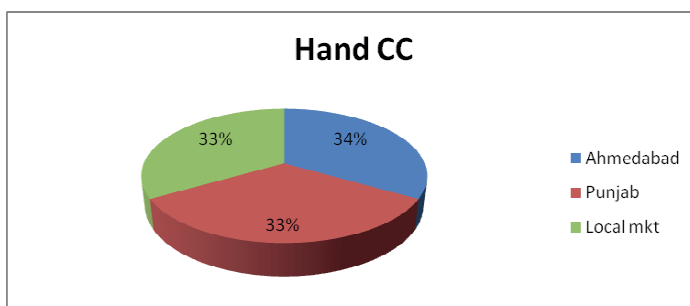
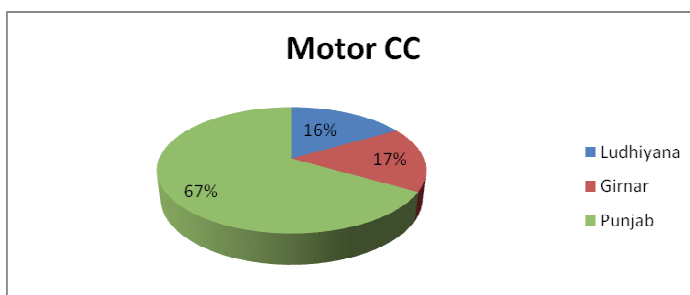
8. Which process you preferred for buying chaff cutter for your soc.



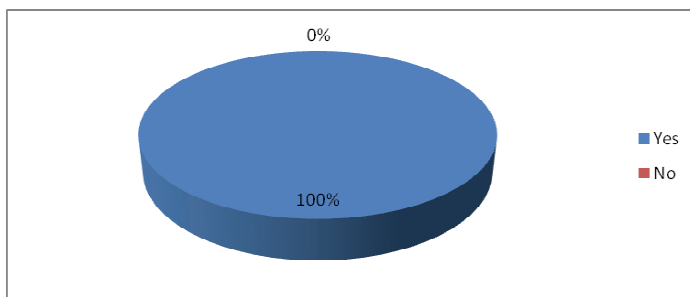
9. What are the parameters to buy the chaff cutters?



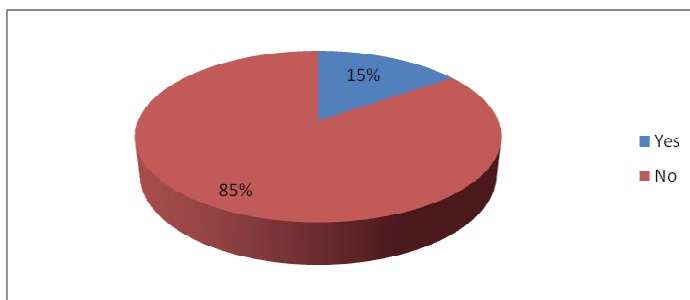
10. From where you have purchased chaff cutter in the year 2010-11?



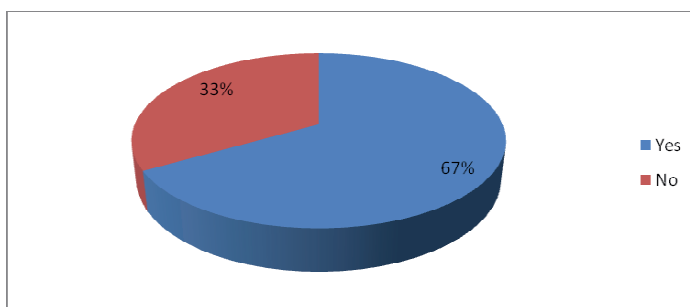
11. Will you prefer the product from other than Gujarat region if it is cost effective?



12. Do you know about Samalkha?

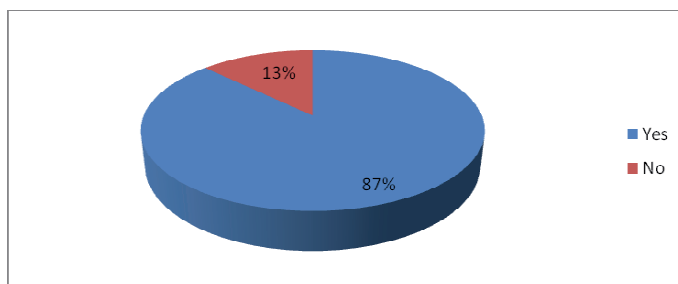


13. Do you wish to run any awareness campaign for AFDP?

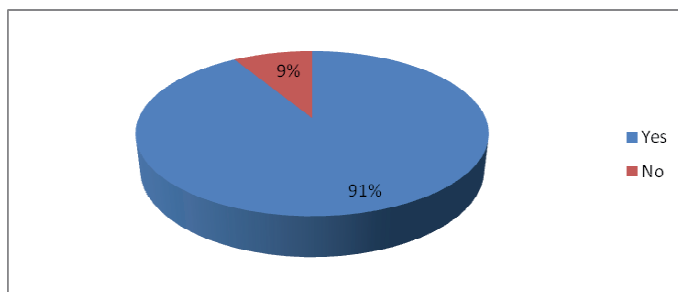


Milk Societies

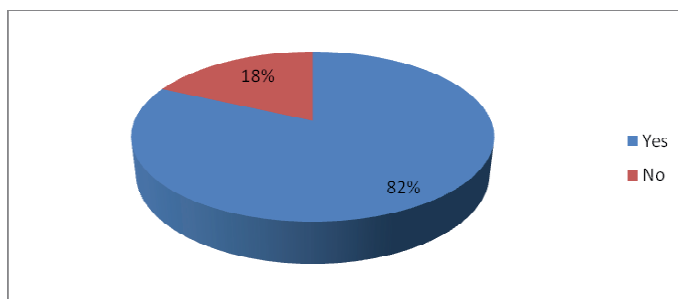
1. Do you know about chaff cutter?



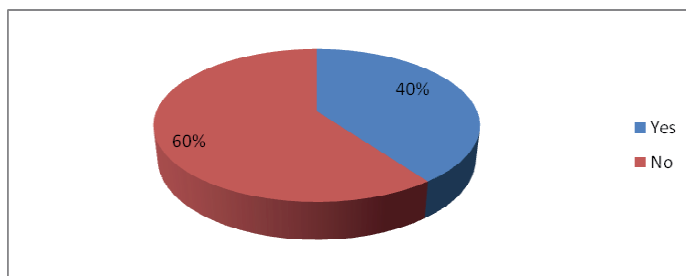
2. If No, do you wish to know about chaff cutter and its benefits?



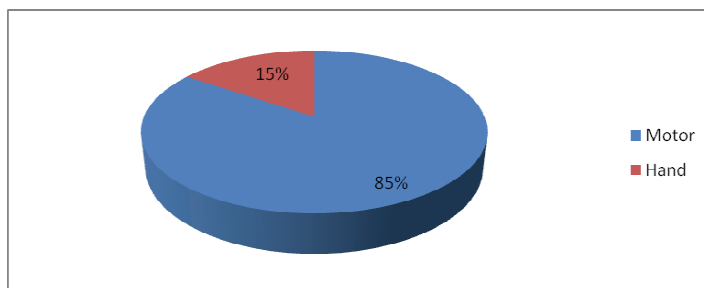
3. Would you prefer to buy chaff cutter after knowing its benefits?



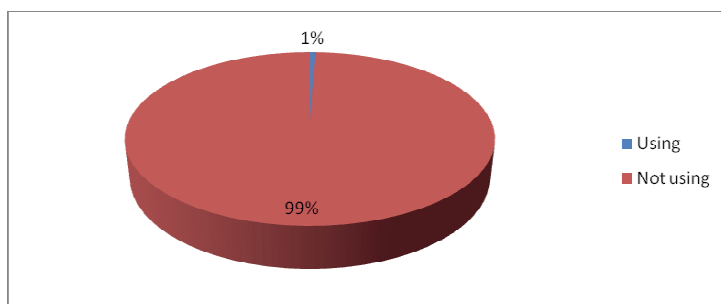
4. Does your members use chaff cutter?



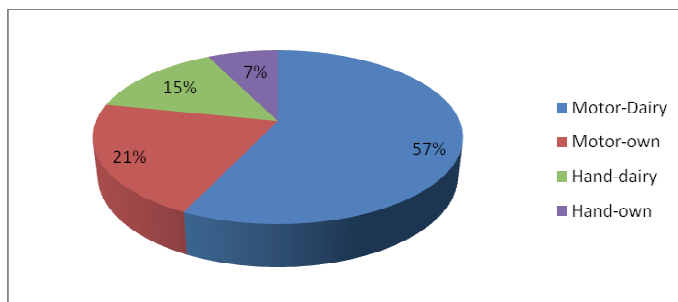
5. If yes, which type of chaff cutter?



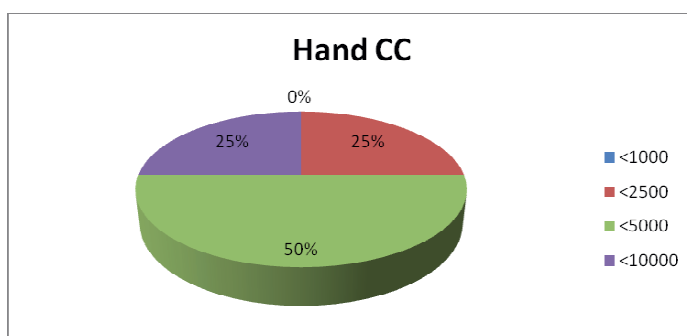
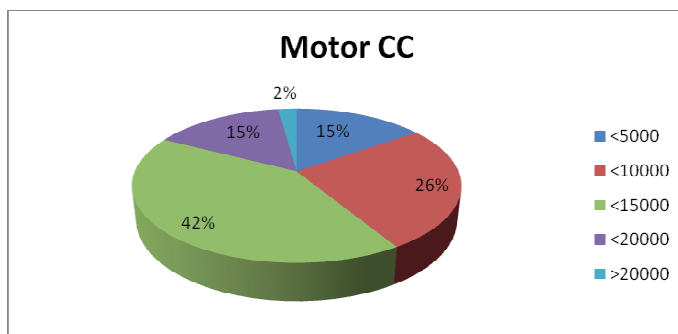
6. Approx how many members are using chaff cutter?



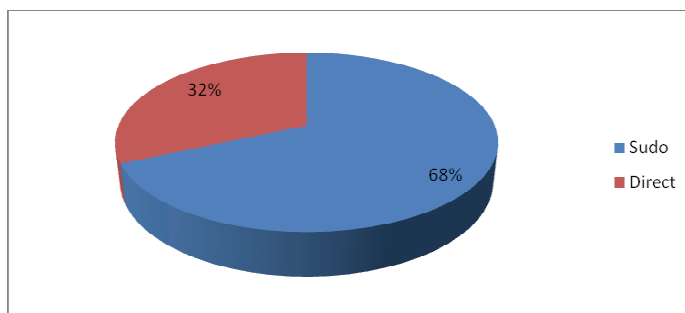
7. How you have bought these chaff cutters?



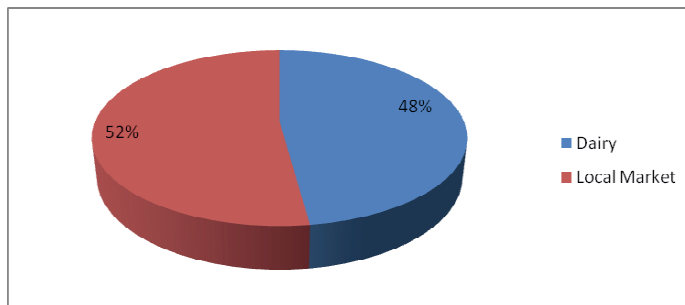
8. At what price you have bought the chaff cutters?



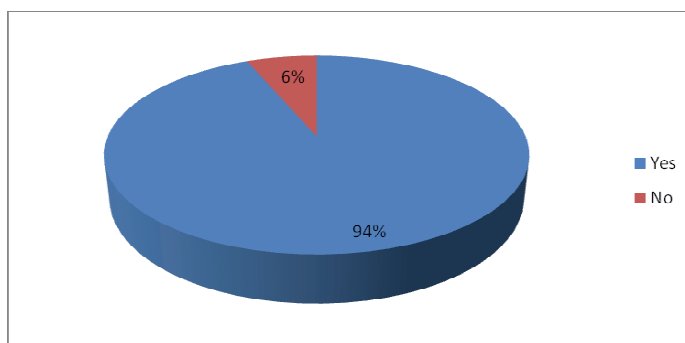
9. If you are not using chaff cutter which other equipment you use for grass cutting?



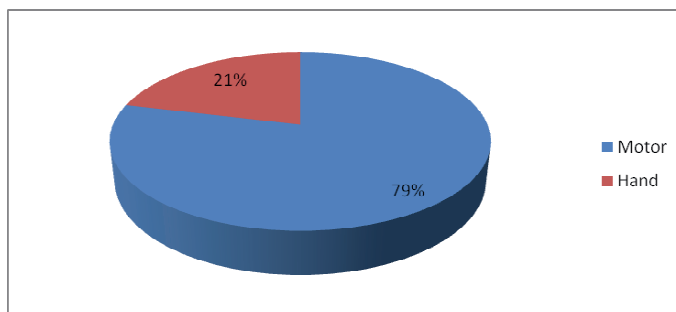
10. From where you buy normal cutter / other equipment?



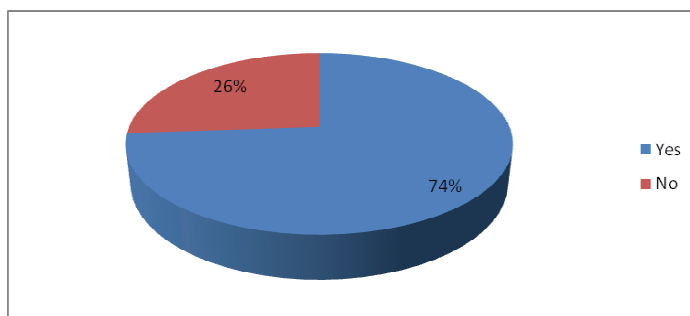
11. If you get 75% subsidy on Chaff cutters, would buy one for you?



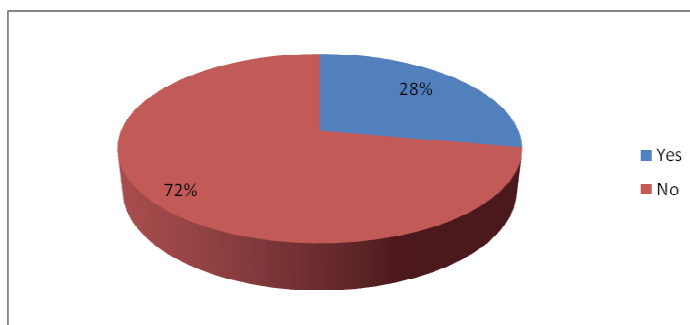
12. If yes, what type?



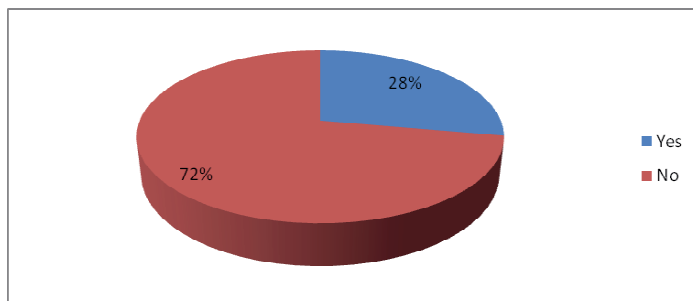
13. Does your dairy have communicated you the scheme of (AFDP)?



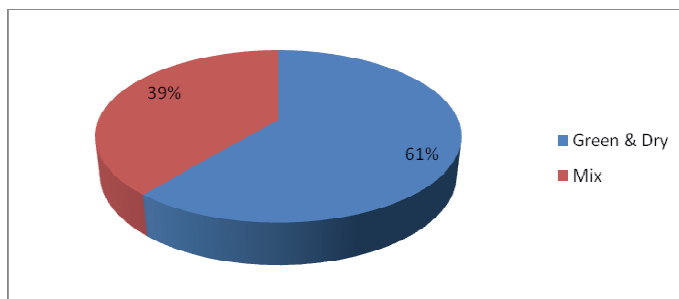
14. Do you know about AFDP scheme?



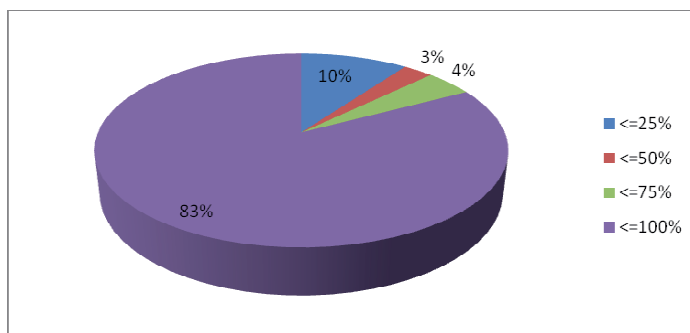
15. Do you know that 75% subsidy is given by govt to buy chaff cutter?



16. What type of pastures you give to the cattle?



17. How many members grow the cattle feeding grass in their farm?



7 KEY Outcomes

Milk Dairies:

1. Dairies are very much keen to provide chaff cutters to their members and some of the dairies are already providing subsidy to promote the chaff cutter amongst their members.
2. Most of the dairies are concern with the product quality and after sales services.
3. Almost all dairies are aware about the RKVY / AFDP scheme and some of them are using the scheme also.
4. Few dairies are also doing awareness campaign for RKVY / AFDP scheme but there approach is not effective and due to that very low response they are receiving from their milk societies.
5. Few dairies are positive to do joint promotion of chaff cutters with the suppliers since they know the benefits of using chaff cutters.
6. Majority dairies preferred the Tender process of buying chaff cutter but in some of the dairies they are directly approaching the suppliers or manufactures.
7. Even those dairies which are buying through tender process, they are very much open for trying new suppliers and secondly they are not stick to one supplier.
8. Price, Quality & after sales services are the prime factor for dairy to buy a chaff cutter.
9. Punjab stands in 1st position in terms of supply of chaff cutter after local supplier.
10. Except Surendranagar dairy, no other dairies have heard about Samalkha or its products.
11. Almost all dairies are open to source/buy chaff cutters from outside Gujarat they are also interested to see Samalkha products to explore the possibility of buying from Samalkha.

Milk Societies:

1. Hardly anyone is interested to by hand operated chaff cutters. In Gujarat due to easy availability of electricity no one is interested to do labour work.
2. Most of the members interviewed are aware about the chaff cutter & its benefits. In fact they are ready to buy chaff cutters but right now the usage of chaff cutter ratio in Gujarat is around 1%.
3. Those who don't know about the chaff cutter and its benefits, after knowing the benefits and usability are showing keen interest to purchase it.
4. Most of the time chaff cutters are sold by the dairy to their members' societies. There are hardly any traders market exists in Gujarat for chaff cutters.
5. Those who are using Motor operated chaff cutter that are priced between Rs. 10,000 to Rs. 20,000 where as hand operated chaff cutter is costing between Rs. 2,500 to Rs. 5,000.
6. Members that are not using the chaff cutter, most of them are using Sudo for cutting the grass & these Sudo are most of time are provided by the dairy and at some places that are available in local market.
7. Majority of milk societies are not aware about AFDP scheme & 75% subsidy scheme of chaff cutters. They have never received any communication from dairy about such scheme.
8. If subsidy of 75% is provided on chaff cutter than majority of people will preferred to buy chaff cutter and that would be Motor operated chaff cutter.
9. Almost every one interviewed is using green & dry both the pastures for feeding the cattle.
10. Majority of the milk society members are cultivating the grass in their own land and very few are buying it from outside.
11. Those members who have more number of cattle they will surely prefer Motor operated chaff cutter & even those who are having 2-3 cattle there first preference is motor operated only.

7.1 Individual Dairy Analysis

Banas Dairy – Palanpur

| | |
|---|--------------------------|
| <i>Name of the Dairy:</i> | Banas Dairy |
| <i>District Name:</i> | Banaskantha |
| <i>Name of the Person:</i> | Mr. Govind Bhai |
| <i>Designation:</i> | Junior Exe. (35 yrs exp) |
| <i>Number of Milk Soc.:</i> | 1400 |
| <i>Total Number of Members:</i> | 3, 00,000+ |
| <i>Approximate no. Of Cattle in District:</i> | 15, 00,000 |
| <i>Are they buying chaff cutters:</i> | Yes |
| <i>Are they providing any subsidy to members? How much:</i> | Yes / 40% |
| <i>Main highlight of the meeting (Any key point):</i> | |
| <ul style="list-style-type: none"> ➤ Chaff cutters can be bought on 2 main condition 1.) Quality & Price shall be reasonable & 2.) End users should like the product. ➤ They have field staff of 100 people. They regularly visit village and they can be utilize to create awareness about the chaff cutters ➤ At least 200 societies will take interest to buy the chaff cutters and each society can buy at least 5 – 10 chaff cutters | |
| <i>How many milk soc. visited in the district?</i> | |
| <ul style="list-style-type: none"> ➤ 15 societies visited | |
| <i>Main highlight of the soc. meetings:</i> | |
| <ul style="list-style-type: none"> ➤ Everyone in societies using chaff cutters are asking for after sales service ➤ Only brochure or printed material is not enough, live demo is required to promote chaff cutters in all the villages. Preferred time for demo is before 9AM or after 6 PM ➤ Dairy is so far not supplying but they are just assisting the societies in connecting them with supplier, if dairy can supply than it will become easier for us to buy. | |

Madhur Dairy – Gandhinagar

| | |
|---|--------------------|
| Name of the Dairy: | Madhur dairy |
| District Name: | Gandhinagar |
| Name of the Person: | Mr. Ketan G. Patel |
| Designation: | Veterinary officer |
| Number of Milk Soc.: | 115 |
| Total Number of Members: | 42,000 |
| Approximate no. Of Cattle in District: | 1,00,000 |
| Are they buying chaff cutters: | No |
| Are they providing any subsidy to members? How much: | Yes / 50% on Sudo |

Major issue with Chaff cutter:

- They have already applied for subsidy for motor operated chaff cutter but no response from Govt. Also the price of motor operated chaff cutters is high in local market that all members cannot afford (Rs. 13,000 to 20,000)

Main highlight of the meeting (Any key point):

- Dr. Rohit Mehta (M.D.) said that dairy needs motor operated chaff cutters & if Samalkha can supply at better rate and quality, they are open to discuss.

How many milk soc. visited in the district?

- 15 societies visited

Main highlight of the soc. meetings:

- Very low awareness about the chaff cutters. Out of 15 societies visited, only 3 societies are aware about the chaff cutters
- Those who have more than 10 cattle are more interested to buy motor chaff cutter
- Many have shown interest to buy chaff cutters, but first they want to see the demonstration of the same.

Sabar Dairy – Himmatnagar

| | |
|---|-------------------------------|
| <i>Name of the Dairy:</i> | Sabar dairy |
| <i>District Name:</i> | Sabarkantha |
| <i>Name of the Person:</i> | Mr. D.B.Patel |
| <i>Designation:</i> | Senior manager |
| <i>Number of Milk Soc.:</i> | 1779 |
| <i>Total Number of Members:</i> | 3, 22,000 |
| <i>Approximate no. Of Cattle in District:</i> | 4, 00,000(app.) |
| <i>Are they buying chaff cutters:</i> | Not yet (but order has given) |
| <i>Are they providing any subsidy to members? How much:</i> | Yes / 60% |

Major issue with Chaff cutter:

- 8 years ago, they bought some motor operated chaff cutters but the life cycle was only 6 months. They want minimum 1 year warranty

Main highlight of the meeting (Any key point):

- They have order some 50 chaff cutters on trial bases from Ludhiana
- They want initially 4 to 5 chaff cutters as demo for 1 month and the product is up to their expectation they can surely buy more.

How many milk soc. visited in the district?

- 15 society visited

Main highlight of the soc. meetings:

- Most of the members are aware about the chaff cutter but the problem is high price
- They want presence of chaff cutter supplier for after sales and before buying they need demonstration

Amul Dairy – Anand

| | |
|--|-----------------|
| <i>Name of the Dairy:</i> | Amul Dairy |
| <i>District Name:</i> | Anand & Kaira |
| <i>Name of the Person:</i> | Dr. Sudhakar |
| <i>Designation:</i> | AM - Healthcare |
| <i>Number of Milk Soc.:</i> | 1,148 |
| <i>Total Number of Members:</i> | 6, 35, 000 |
| <i>Approximate no. Of Cattle in District:</i> | 12,50,000 |
| <i>Are they buying chaff cutters:</i> | Yes |
| <i>How many milk soc. visited in the district:</i> | 16 Milk Society |

Are they providing any subsidy to members? How much:

- 30% on Sudo & 25% on Motor Chaff cutter is provided by AMUL Dairy

Major issue with Chaff cutter:

- Basically farmers are very poor so they can't afford the high price chaff cutter, so if there is any scheme / subsidy is provided by dairy / govt than farmers will surely buy

Main highlight of the meeting (Any key point):

- Any manufacturing company of chaff cutter is welcome in AMUL for supply if it provides good quality of product with reasonable price
- Dairy people don't know about the AFDP scheme. Since it is a private dairy they are offering their own subsidy and under that last year 304 milk societies got the benefit.

Main highlight of the soc. meetings:

- Society members don't know about the govt AFDP scheme of 75% subsidy on chaff cutter and if it is been offered they are keen to avail such subsidy scheme.
- People are interested in both kind of chaff cutter, hand and motor operated. From the 16 societies visited for survey, around 350 motor operated and 200 hand operated chaff cutters are demanded.

Sugam Dairy – Vadodara

| | |
|---|-----------------|
| Dairy Name: | Sugam Dairy |
| District Name: | Vadodara |
| Name of the Person: | Mr. P.K. SONI |
| Designation: | Manager input |
| Number of Milk Soc.: | 1,221 |
| Total Number of Members: | 2,05,292 |
| Approximate no. Of Cattle in District: | 6,00,000 |
| Are they buying chaff cutters: | Yes |
| Are they providing any subsidy to members? How much: | No |
| How many milk soc. visited in the district: | 14 Milk Society |

Major issue with Chaff cutter:

- Awareness is one big issue with chaff cutters
- People are not motivated to buy chaff cutters; if motivation and exposure will increase then the scenario will be different.

Main highlight of the meeting (Any key point):

- They bought samalkha chaff cutter 7 years ago, not happy with blade, no after sales.
- They need some local presence of the suppliers.
- No one is interested in hard work, people will prefer motor operated
- 1200 society in baroda out of which on 240 are using chaff cutters (20%)
- They are open to meet samalkha and they need awareness support for the chaff cutter promotion

Main highlight of the soc. meetings:

- We will purchase the product through dairy.
- Only 10% milk soc. Members those who fall in BPL category will prefer hand operated rest 90% will prefer motor operated.
- Bhaili Milk society's chairman is trading in chaff cutters. He buys from Ahmedabad and Punjab. (Mr. Ashwin Patel)

Dudh Dhara Dairy – Bharuch

Name of the Dairy: Dudh Dhara Dairy

District Name: Bharuch

Contact person: DR. A.B PATEL

Designation: Manager input

Number of Milk Soc.: 550

Total Number of Members: 70,000

Approximate no. Of Cattle in District: 47,000

Are they buying chaff cutters: Yes

Are they providing any subsidy to members? How much: Yes / Rs. 4,500

How many milk soc. visited in the district: 10 Milk Society

Major issue with Chaff cutter:

- People in this region are lethargic and that's why they don't prefer to cut grass with chaff cutter.
- Communicating the benefits to them will change their mentality.
- After sales back up is again one of the strongest reason because of which people have stopped using the chaff cutters.

Main highlight of the meeting (Any key point):

- Dairy follow the direct approach in buying chaff cutters (No tender system)
- 2010-11 they purchased motor operated chaff cutters from Yash Agro – A' bad, and 100 Hand operated chaff cutters from National Agro Kalol
- Bharuch dairy gives Rs.4500 subsidy to their members
- In their specifications to buy the chaff cutters, they includes extra belt, stand and blades
- 2011-12 AFD scheme – 800 members are interested
- They are open to meet Samalkha

Main highlight of the soc. meetings:

- They are getting benefits under AFDP scheme.
- Kurchan village is interested for awareness about the chaff cutter

Sumul Dairy – Surat

| | |
|--|------------------|
| <i>Name of the Dairy:</i> | Sumul dairy |
| <i>District Name:</i> | Surat |
| <i>Name of the Person:</i> | DR. S.K Mangukia |
| <i>Designation:</i> | Manager Input |
| <i>Number of Milk Soc.:</i> | 950 |
| <i>Total Number of Members:</i> | 2,25,000 |
| <i>Approximate No. Of Cattle in District:</i> | 9,00,000 |
| <i>Are They Buying Chaff Cutters:</i> | Yes |
| <i>Are They Providing Any Subsidy To Members? How Much:</i> | Yes / Rs. 4,500 |
| <i>How Many Milk Soc. Visited In the District:</i> | 12 Milk Society |

Major Issue with Chaff Cutter:

- Chaff cutter suppliers/traders are fragmented and due to that they find difficulty in buying chaff cutters locally.

Main Highlight of the Meeting (Any Key Point):

- Last 15 years Sumul dairies are selling chaff cutters. Mainly buying from Punjab and Ahmedabad. Almost 15,000 chaff cutters are sold.
- They don't know about Samalkha but they are open to explore the possibilities to source.
- They have purchase chaff cutter after visiting the manufacturing unit in Punjab and Ahmedabad.

Main Highlight of the Soc. Meetings:

- If awareness is being created then demand is surely going to increase.
- Majority of the soc are using Raja Toka brand of Punjab. Mainly use for cutting the sugar cane instead of grass.

Sursagar Dairy – Surendranagar

| | |
|--|------------------|
| Name of the Dairy: | Sursagar Dairy |
| District Name: | Surendranagar |
| Name of the Person: | Mr. B.D.Panchal |
| Designation: | AM - Procurement |
| Number of Milk Soc.: | 645 |
| Total Number of Members: | 1,18,000 |
| Approximate no. Of Cattle in District: | 5,00,000 |
| Are they buying chaff cutters: | Yes |
| How many milk soc. visited in the district: | 15 Milk society |

Are they providing any subsidy to members? How much:

- Under AFDP scheme, 75% subsidy

Major issue with Chaff cutter:

- Last year they got approval of Rs. 22 Lacs for chaff cutters so 60 milk soc got the benefit of motor chaff cutter and 100 milk soc got Hand chaff cutter
- Last year they bought 86 motor chaff cutter from Ginar @ Rs.20,000 and 238 hand chaff cutter from Punjab @Rs. 5,000/-. They are providing 75% subsidy under AFDP

Main highlight of the meeting (Any key point):

- Few years ago milk soc bought chaff cutter through NCCF but the quality of the product was not good so now dairy is directly purchasing chaff cutters from suppliers and providing to the milk soc.
- Jasdan chaff cutter has good quality but samalkha's hand operated chaff cutter is not good at quality

Main highlight of the soc. meetings:

- In menka village, they are not interested in hand cutter because of scarcity of man power & machine is not cutting grass properly that are sold by Samalkha.
- In kothriya village, they are interested to buy motor operated chaff cutter if service, warranty & quality are provided

Vasudhara Dairy – Valsad

| | |
|--|-------------------|
| <i>Name of The Dairy:</i> | Vasudhara dairy |
| <i>District Name:</i> | Valsad |
| <i>Name of the Person:</i> | Mr. R.K Sinha |
| <i>Designation:</i> | Manager Input |
| <i>Number of Milk Soc.:</i> | 1200 |
| <i>Total Number of Members:</i> | 70,000 |
| <i>Approximate No. Of Cattle in District:</i> | 3,00,000 |
| <i>Are They Buying Chaff Cutters:</i> | Yes |
| <i>Are They Providing Any Subsidy To Members? How Much:</i> | No |
| <i>How Many Milk Soc. Visited In the District:</i> | 14 Milk societies |
| <i>Major Issue with Chaff Cutter:</i> | Lack of Awareness |

Main Highlight of the Meeting (Any Key Point):

- Dairies are offering Chaff Cutters on 0 interest installments of 12 months.
- Purchasing mainly from Punjab, Raja Toka and Goraya
- They don't know about Samalkha, but they are open only if the products are cost effective
- Dairy needs support in awareness activities for chaff cutters
- Sudo (Traditional cutters) 3000 supplied under AFDP, not interested in AFDP support for chaff cutter
- They run FOP (Farmer Orientation Program) to create awareness about the Chaff cutters
- 2010-11 they sold 100 motor operated chaff cutters purchased from Yash agro @ Rs. 14,500 and distributed amongst the members

Main Highlight of the Soc. Meetings:

- Biggest gap is that societies doesn't know that dairy is offering installment scheme for chaff cutters
- Mr. Ram Devbhai was interested to buy 100 chaff cutters (Prime condition. It should cut all type of grass)
- One chaff cutter is already with Ramdevbhai of Punjab brand. He bought this from dairy at Rs. 13,500 without any installment support. He is not satisfied with that.

Sorath Dairy – Junagadh

| | |
|--|-----------------------|
| Name of the Dairy: | Sorath Dairy |
| District Name: | Junagadh |
| Name of the Person: | Dr. H.A.Kamdar |
| Designation: | Manager - Procurement |
| Number of Milk Soc.: | 300 |
| Total Number of Members: | 15,000 |
| Approximate no. Of Cattle in District: | 30,000 |
| Are they buying chaff cutters: | No |
| How many milk soc. visited in the district: | 12 Milk society |

Are they providing any subsidy to members? How much:

- Dairy is not interested in providing subsidy for the chaff cutter.

Major issue with Chaff cutter:

- Farmers are not aware about the chaff cutter

Main highlight of the meeting (Any key point):

- Dairy can directly do the business with suppliers if good quality & price of product are provided
- BAIF (Bhartiya Agro Industry Foundation) is providing sudo to members worth rs.700 at free of cost. This subsidy is provided by Jilla gram vikas agency.
- Proposal stage of BAIF:
 - [1] Seminar or meeting at village level
 - [2] Generate the demand & prepare the report & send to GRISERV, Baroda for final approval
 - [3] After get the sanction from GRISERV, Samalkha can do the business

Main highlight of the soc. meetings:

- Members are directly purchasing the products from suppliers or BAIF (Bhartiya Agro Industry Foundation)
- They don't know about chaff cutter & AFDP
- This people are more interested in motor chaff cutter after knowing its benefits

Dudhsagar Dairy – Mehsana

| | |
|--|---------------------------|
| <i>Name of the Dairy:</i> | Dudhsagar dairy |
| <i>District Name:</i> | Mehsana |
| <i>Name of the Person:</i> | Dr. Joshi |
| <i>Designation:</i> | Head of veterinary depart |
| <i>Number of Milk Soc.:</i> | 1200 |
| <i>Total Number of Members:</i> | 2, 70,000 |
| <i>Approximate no. Of Cattle in District:</i> | 12, 00,000 |
| <i>Are they buying chaff cutters:</i> | Yes |
| <i>Are they providing any subsidy to members? How much:</i> | Yes / 30% |

Main highlight of the meeting (Any key point):

- Dairy is buying directly from the manufacturers/suppliers if they like the product. Dairy do not entertain middleman

How many milk soc. visited in the district?

- 15 societies visited

Main highlight of the soc. meetings:

- Many members are ready to buy chaff cutter. At present those are using chaff cutters, they are not happy with after sales services. If some part of machine gets spoiled, they don't have service provider to repair it or replace the spoiled part.
- Some members think that north India chaff cutter will not cut the Dry grass.

Panchamrut Dairy – Godhra

| | |
|---|---------------------|
| <i>Name of the Dairy:</i> | Panchamrut Dairy |
| <i>District Name:</i> | Godhra |
| <i>Name of the Person:</i> | Mr. Yusuf Pathan |
| <i>Designation:</i> | Manager Procurement |
| <i>Number of Milk Soc.:</i> | 1916 |
| <i>Total Number of Members:</i> | 3,60,000 |
| <i>Approximate no. Of Cattle in District:</i> | 15,00,000 |
| <i>Are they buying chaff cutters:</i> | Yes |
| <i>How many milk soc. visited in the district:</i> | 15 Milk society |

Are they providing any subsidy to members? How much:

- Providing chaff cutter at Rs. 13000 market price of the same is Rs. 19000

Major issue with Chaff cutter:

- More than 60% member are using Sudo or direct feeding the grass without cutting

Main highlight of the meeting (Any key point):

- They can go for other than Gujarat based company if quality, price, after sales service, and ISI mark is attached.
- They don't know about Samalkha but they are open to new opportunity

Main highlight of the soc. meetings:

- Many milk societies are interested in purchasing chaff cutters after they came to know about the benefits of using chaff cutters.

Uttam Dairy – Ahmedabad

| | |
|--|-----------------|
| <i>Name of the Dairy:</i> | Uttam Dairy |
| <i>District Name:</i> | Ahmedabad |
| <i>Name of the Person:</i> | Dr. D.I. Patel |
| <i>Designation:</i> | Manager Input |
| <i>Number of Milk Soc.:</i> | 640 |
| <i>Total Number of Members:</i> | 80,000 |
| <i>Approximate No. Of Cattle in District:</i> | 3,00,000 |
| <i>Are They Buying Chaff Cutters:</i> | Yes |
| <i>How Many Milk Soc. visited In the District:</i> | 15 Milk Society |
| <i>Are They Providing Any Subsidy To Members? How Much:</i> | No |
| <i>Major Issue with Chaff Cutter:</i> | |

- People are lazy that's why use of chaff cutters is low

Main Highlight of the Meeting (Any Key Point):

- Dairy has suggested to develop a media campaign to create awareness about the chaff cutters

Main Highlight of the Soc. Meetings:

- People don't know much about chaff cutters and the exposure is also very low.

8 STRATEGY FORMULATIONS AND EXECUTION: ENTRY OF SAMALKHA CHAFF CUTTER CLUSTER IN GUJARAT

1. First of all, good promotion material is required i.e. Brochure, catalogue, Power point presentation, videos. Also some of the material needs to be converted in to local language since these products are mainly used by farmers and they do not understand English.
2. Once the basic materials are ready, we can plan one buyer – seller meet in Gujarat for Samalkha producer with the prospective dairies to promote chaff cutters.
3. After meeting with the prospective dairies and on the basis of potential business tie up, Samalkha can decide upon which dairy to start working with in Gujarat.
4. Samalkha can invite some prospective dairies to visit units in Samalkha to give them confidence of supply and that can create good bonding with the buyers
5. Best way to get entry in to the Gujarat markets is to tie up with at least one or two dairies initially and then expanding it to more dairies and areas.
6. Dairies that are opting direct approach in sourcing the chaff cutters for their members can targeted first and exclusive tie up can be done where discounted rates can be offered on certain numbers of chaff cutters, also the delivery and liberal credit terms can be set and as suggested provision of after sales services can be created.
7. Since most of the dairies are aware that chaff cutter is useful tool to increase productivity of milk producing cattle, they all are offering some short of subsidy/facility to their milk society's members but still there is big gap in terms of awareness creation about the chaff cutters. Samalkha can join hands with dairy on the basis of creating awareness about benefits and usability of chaff cutters to the milk societies and that can be the entry point for the Samalkha chaff cutters in Gujarat market.
8. To create awareness in Gujarat only printed material will not be useful. Live demonstration will be required to create awareness about the chaff cutters. Samalkha can join the hands with dairy and hire a vehicle which can carry a chaff cutter to different villages and demonstrate the usefulness of the
9. Samalkha will have to develop local presence through dairy/sole distributor in Gujarat to promote chaff cutters in Gujarat. Either at dairy level or the appointed distributor will have to act as main point with regards to after sales service or spare parts requirements generated in that particular region. In case of dairy Samalkha can train

one of the staff or if the demand is high they jointly can hire a person who can specifically look after the promotion and after sales issues of chaff cutter in that region.

10. There are certain things which Samalkha have to take in to consideration while targeting the Gujarat market. 1. Chaff cutter should cut green and dry both grass 2. Motor operated chaff cutters have more market demand in Gujarat 3. Hand operated chaff cutters are also in small demand but that should have convertibility option to motor operated 4. Extra blades should be supplied along with the main blades in the machine and that can solve after sale service problem related to blades.

9 OUTCOMES OF B2B MEETING

Samalkha industrial association arrived on 4th July 2011 at 9:30 AM in Ahmedabad. Two groups were formed and each group started its journey for dairy meetings on the same day. One group went to districts like Ahmedabad, Surendranagar, Himmatnagar, Mehsana, and Palanpur and the other group went to districts like Anand, Baroda, Bharuch and Surat. Below is the detailed report for each meeting.

GROUP 1:

1. MoM (Minutes of Meeting) of Banas Dairy, Palanpur:

- Met with Mr. M.K. Patel (Purchase department)
- After discussing about Samalkha's chaff cutter & also after showing him video of motor operated chaff cutter they get satisfied with the specifications and details of the products
- **Banas dairy gave a trial order of 150 motor chaff cutter to SIA**
- Mr. Patel suggested that if this trial order is supplied satisfactory and if the farmer will demand more than Banas dairy will give big order to Samalkha

2. MoM of Sabar Dairy, Himmatnagar:

- Met with Mr. D.B. Patel (Senior Manager - M.P.O. DEPT) and discussed with him about the intention of our meeting and further plan of SIA in Gujarat for the promotion of Chaff cutters
- Mr. Patel told us that Sabar dairy had purchased motor operated chaff cutter from Payal foundry, Panjab few year back. He advised us to visit the persons using that chaff cutters to take their feedback
- SIA team had visited Surajpura village. During visit to this village we met with one person who was using motor operated chaff cutter with gear supplied from Punjab. Farmer said that this type of machine is not useful to since the gear function & excess mettle is used in this chaff cutters are not useful and secondly due to this the price of chaff cutter is going high compare to Samalkha's chaff cutter

- Mr. D.B. Patel has agreed on doing awareness program with support of dairy at village level and he also agreed to the point that with this kind of awareness program only the usage of chaff cutters will increase
- SIA has also explained the after sales service point to Mr. D.B. Patel to which Mr. Patel got more confidence about the SIA and its plan

3. MoM of Uttam Dairy, Ahmedabad:

- Met with Dr. D. I. Patel (Assistant Manager Input Dept.) & Mr. M. M. Patel. At present Uttam Dairy is buying chaff cutters from NCCF
- Dr. D.I. Patel said that in Ahmedabad district, farmers are less hard worker so they do not prefer hand operated chaff cutters
- Dr. Patel suggested that in the coming years, the demand of chaff cutter will surely be more since Govt. of Gujarat is getting very active for Fodder saving movement across the state

4. MoM of SurSagar Dairy, Surendranagar:

- Met with Mr. Chaudhari (GM) & Mr. B.D. Panchal (Asst. Manager)
- Surendranagar dairy has already purchased chaff cutters of Samalkha and they have met with Mr. Ved earlier in Ahmedabad and also visited Samalkha before making an order last year
- Mr. Chaudhari has put forward some of the issues with Samalkha products. One of the main concerns with Samalkha products is Safety. Secondly the after sales service is also required for the farmers those who buy chaff cutters from Samalkha
- Also Mr. Chaudhari suggested that they have received complaints for the chaff cutters supplied by Samalkha from one village saying that it is not up to the mark
- Mr. Chaudhari suggested that motor operated chaff cutter are in more demand

GROUP 2:

5. MoM of Amul Dairy, Anand:

- We met with Dr. S. T. Baikre and his team and discussed the possibility of supplying Samalkha chaff cutter to Amul's milk societies
- Dr. Baikre and his team explained their previous experience of supplying chaff cutters and also difficulties in promoting it amongst the members
- Major difficulty Amul and the member's facing is the after sales services
- Secondly the availability of chaff cutters at local market are very less and that are available in the market are not up to the mark
- Amul dairy is interested to join hands with Samalkha Industrial Association (SIA) to promote chaff cutters amongst the members' society of Amul
- Dr. Baikre suggested that SIA shall provide sample machines to display in Dairy and also at the farm where members are visiting regularly
- One dead machine Dairy will keep in their premise just for display and 2 machine (one motor operated and one hand operated) will be kept at Amul dairy farm near Mogar
- Members interested to see the working of chaff cutter can visit Mogar farm and they will decide to buy it or not and the information of their interest will be collected by dairy staff
- Amul Dairy is suggesting that this way the awareness can be created amongst the mil societies
- Other suggestions from dairy is that SIA must depute one person locally to provide all after sales services so the members finding any difficulties in operating machine can contact that person
- Dr. Baikre also extended his support in identifying local person to support this initiative with SIA
- Dr. Baikre has suggested that Amul can further assist in joining hands with SIA after discussing whole matter with the M.D. of Amul Dairy

6. MoM of GRISERV, Baroda:

- GRISERV is an N.G.O which assists farmers in the consumption of farm equipments and it has its operations in many cities of India
- This organization gets private funding as well as aid from the government and from that money it gives different types of assistance to farmers
- GRISERV can be helpful in long term because they get many funding which they can allot for promoting chaff cutters amongst the poor farmers involved in milk production
- If long term relations are being maintained with this organization then its pan India operations and big size can be helpful in future

7. MoM of Sugam Dairy, Baroda:

- First response that we have received from the Baroda dairy representative is that in Baroda district the demand for chaff cutters is very low and dairy is selling very meager number of cutters every year
- Despite of their efforts to make people aware regarding the usage and benefits of chaff cutters farmers are hardly coming ahead and demanding for the chaff cutters
- Dairy is certainly interested in promoting chaff cutters amongst their milk societies and ready to come ahead with SIA in its promotion activities but Dairy lacks in confidence whether these efforts will yield good results
- Baroda dairy is unable to sell the chaff cutters which they have bought in past and that are still kept in storage of the dairy right now. In such situation SIA cannot expect any immediate business possibilities with Baroda dairy

8. MoM of Sumul Dairy, Surat:

- We have met with CEO of Sumul dairy Mr. Pandey. He shown very keen interest in buying SIA products but he suggested that SIA must provide machine with gears than only Sumul members will purchase chaff cutters

- While discussing with the CEO when SIA offered chaff cutters manufactured by SIA and that are without gear, CEO of Sumul very clearly said that “Supply the chaff cutters which our members want, not the one that you manufacture”
- Sumul dairy is purchasing chaff cutters from Punjab since last 10 years and they are satisfied with the product
- Members of milk societies in Sumul prefer the motor operated chaff cutter with gear in it
- Sumul Dairy also wants some changes in the product of SIA with more safety features in it
- By September end Sumul will require about 200 chaff cutters but the chances for SIA are only there if they make motor chaff cutter with gear. Sumul every year buys around 500 to 700 chaff cutters
- Considering above demand, SIA have very good potential to enter in to this ready market only if SIA wishes to change their product as per demand

9. MoM of Dudhdhara Dairy, Bharuch:

- Bharuch dairy have recently purchased 714 hand operated chaff cutters under AFDP scheme. But the demand for hand chaff cutters is very negligible in whole Gujarat region
- Bharuch dairy receives chaff cutters from NCCF because they have received this notification from GOVT OF INDIA. NCCF is Govt. approved organization that purchases chaff cutters on behalf of dairy. NCCF has office in Ahmedabad
- Bharuch dairy asked SIA to send one sample at NCCF for their approval so that whenever dairy get the further approval under AFDP scheme they can approach NCCF and purchase SIA product from them
- In the coming 6 months Bharuch dairy is expecting AFDP approval for 1000 motor operated chaff cutters
- Dairy was of clear view that purchasing of chaff cutters is not in our hands but it depends on the NCCF but dairy can certainly insist NCCF to supply SIA products. An to do this the samples of SIA must be approved by NCCF and it should be available at NCCF Ahmedabad office

CONCLUSION

In every industry there is a desire for further expansion and if this is done through a formal channel then the task becomes easy for the Industrial cumulative growth. The same thing is applicable to the Samalkha industrial association where MSME foundation runs cluster development programme. The Kamma Inc is appointed as marketing consultant to provide Market Development Assistant to the Samalkha Cluster to enter in to the Gujarat market for the promotion of Chaff Cutters. To accomplish this task assigned to The KAMMA Inc. they have hired me as Summer Trainee.

Initially we had visited 13 Milk Dairy & 180 Milk Society in Gujarat region. We found some major highlights like:

Demand of chaff cutter is low due to high price & lack of After Sales Services. Here farmers don't want to do hard work by using Hand Chaff Cutter but they preferred smart work by using Motor Chaff Cutter.

In Samalkha cluster, all foundries members have come together & form an association called "Samalkha Industrial Association".

After presenting our research report in front of MSME Foundation & Samalkha Industrial Association, they found Gujarat region attractive & they decided to meet prospective Milk Dairies of Gujarat.

In B2B meeting, they focused on three major aspects:

- Awareness / Demonstration at Village Level
- Good Quality product with safety features
- In After Sales Services, Samalkha Association will hire Two Sales Executives for Gujarat region

Major Breakthrough of B2B meetings:

- Banas dairy has given trial order of 150 hand operated chaff cutters and already the specifications are sent to SIA
- Amul dairy seems to be very positive about the chaff cutters promotion in Amul and conceptually they have agreed to do joint activities for promotion of chaff cutters

- Sumul dairy, Surat is very much interested to buy SIA products if they make some changes in the machine like adding Gears and machines covered for the safety aspects
- Bharuch dairy is expecting big demand of 1000 motor operated chaff cutter which they will source through NCCF
- SIA needs to get approved their products at NCCF and that will give them advantage at the time of supplying of chaff cutters at Bharuch and Ahmedabad dairy
- There are certain changes which SIA needs to do in their product with respect to its look, functionality and safety aspects and after that only they can get better positioning in Gujarat market
- Mr. Rashmin Chauhan was part of one group which has visited Banas, Surendranagar, Himmatnagar and Ahmedabad dairy. SIA members found him fit to start working for SIA in Gujarat

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ANNEXURE

Questionnaire: Survey of Chaff Cutter

(Milk Dairy)

Personal Information:

| | |
|----------------|--|
| Contact Person | |
| Designation | |
| Address | |
| Contact No | |

1. Do the members of your milk societies use the chaff cutters? Yes / No
2. If No, why not using chaff cutters? _____
3. Are you aware about RKVY / AFDP scheme of Govt. of India? Yes / No
 - If yes, continue and skip Que. No. 18 – 23
 - If answer is NO go to question No. 18
4. Do the members of your milk societies aware about AFDP scheme? Yes / No
5. Do you run any awareness campaign for AFDP? Yes / No

Yes (What strategy): _____
6. Do you require any additional support to run awareness on AFDP for your soc.?

Ans.: _____
7. If you are aware about the AFDP scheme than have you ever applied for the subsidy from the govt under AFDP for chaff cutters? Yes / No
8. If yes and if you have already applied and received any support, can you advice, how much time it required clearing the subsidy amount from the govt? (Days / Months)

Ans.: _____
9. How many milk societies got benefits of AFDP scheme in the year 2010-11

Ans.: _____
10. Which process you preferred for buying chaff cutter for your soc.: Direct approach / Tender
11. How do you identify the suppliers for the chaff cutters?

Ans.: _____
12. From where you have purchased chaff cutter in the year 2010-11?

Motor operated: _____

Hand operated: _____
13. At what price you have bought the chaff cutters in the year 2010-11?

Motor operated: _____

Hand operated: _____
14. Will you prefer the product from other than Gujarat region if it is cost effective? Yes / No

15. Do you know about Samalkha?

If Yes: have you ever approached Samalkha for chaff cutters?

If No: Are you interested to know more about Samalkha?

16. In your opinion, how many societies may take interest to avail the AFDP scheme support in the financial year 2011-12?

Ans.: _____

17. If you know about AFDP and Not yet applied for Chaff cutter support for your soc., why?

Any specific reason?

Ans.: _____

18. If No, do you wish to know more about the AFDP scheme? Yes/ No

19. Do you know that govt. is offering 75% subsidy under AFDP scheme? Yes/ No

20. Do you wish to run any awareness campaign for AFDP? Yes / No

Yes (What support you expect): _____

No (Why not): _____

21. In your opinion, what would be the effect on society / farmer regarding this awareness?

Ans.: _____

22. How many societies / members would prefer to buy chaff cutter if awareness is been created?

Ans. _____

23. Will you prefer the product from other than Gujarat region if it is cost effective? Yes / No

24. How many societies are active under your dairy?

Ans.: _____

25. Approximately how many members in your all societies?

Ans.: _____

26. Approximately how many cattle in your region (Soc.)?

Ans: _____

27. How many litres milk are you collecting every day from your societies?

Ans: _____

28. How much you pay per litre to the soc. & farmer?

Societies: _____ Farmers: _____

Questionnaire: Survey of Chaff Cutter

(Milk Society)

Personal Information:

| | |
|----------------|--|
| Contact Person | |
| Designation | |
| Address | |
| Contact No | |

1. How many members you have in your society?
20-40 41-80 81-120 Above 120
2. Do you know about chaff cutter? Yes / No
 - If answer is YES than go to QUE NO. 5
3. If No, do you wish to know about chaff cutter and its benefits? Yes / No
 - If Answer is YES, explain the benefits of chaff cutter
4. Would you prefer to buy chaff cutter after knowing its benefits? Yes / No
5. Do your members use chaff cutter? Yes / No
6. If yes, which type of chaff cutter? Motor / Hand
7. Approx how many members are using chaff cutter?
1-5 6-10 11-20 Above 20
8. How many motor operated and how many hand operated
Motor operated _____ Hand operated _____
9. How you have bought these chaff cutters? Buy Own / Supported by dairy
10. From where you buy the chaff cutter?
APMC Market Local Market Dairy Others _____
11. At what price you have bought the chaff cutters?
Motor operated: _____ Hand operated: _____
12. If you are not using chaff cutter which other equipment you use for grass cutting?
Ans.: _____

13. From where you buy normal cutter / other equipment?

APMC Market

Local Market

Dairy

Others_____

14. If you get 75% subsidy on Chaff cutters, would buy one for you? Yes / No

15. If yes, what type?

Motor / Hand operate

16. Does your dairy have communicated you the scheme of (AFDP)? Yes / No

- If NO than go to QUE No. 19

17. If yes, have you avail any support for your members? Yes / No

18. If No, why are you not utilising the scheme? What are the constraints?

Ans.: _____

19. Do you know about AFDP scheme? Yes / No

- If NO then explain AFDP scheme

20. Do you know that 75% subsidy is given by govt to buy chaff cutter? Yes / No

21. What type of pastures you give to the cattle? Green / Dry / Mix

22. Per cattle how much grass do you feed per day?

1-4kg

5-10kg

11-15kg

23. How many members grow the cattle feeding grass in their farm?

1-20

21-40

41-60

Above 60

24. How many members are purchasing grasses from outside?

1-20

21-40

41-60

Above 60

25. Approx how much cost is of per kg grass? (in case if purchased from outside)

Ans. _____

26. How many numbers of cattle per members are having?

1-3

4-5

6-10

Above 10

27. How much money you are getting per litre from the dairy?

Ans: _____

Contact Details:

Dairy

| Contact Person | Designation | Address | Contact No |
|------------------|----------------------------|------------------------------|---------------|
| Mr. D.I.Patel | Am - Inputs | Uttam Dairy, Ahmedabad | 99225228322 |
| Ketan G.Patel | Vetaranary Officer | Madhur, Gandhinagar | 9662523584 |
| Govindbhai | Junior Executive | Banas Dairy, Palanpur | 27742253781 |
| D.B.Patel | Senior Manager(M.P.O) | Sabar Dairy,Himmatnagar | 226051-226060 |
| Dr. Joshi | Head Of Veternary Dprt | Dudh Sagar, Mehsana | 2762292390 |
| Mr P.K. Soni | Manager Input | Vadodara District Co-Op Milk | 9909900457 |
| Mr. Upadhyay | Purchase Manager | Valsad Dairy | 9377040689 |
| Dr S.A Mangukia | Manager Veternary | Surat Dairy | 9979888005 |
| Dr A.B Patel | Input Incharge | Bharuch Dairy | 9428511322 |
| Dr. Sudhakar | Dy. Mngr-Animal Healthcare | Amul Dairy, Anand | 9727703262 |
| Mr. B.D.Panchal | Am - Procurement | SurSagar Dairy-Surendranagar | 9099053301 |
| Mr. Yusuf Pathan | Manager - Procurement | Panchamrut Dairy, Godhra | 9909967951 |
| Dr. H.A.Kamdar | Manager - Procurement | Sorath Dairy, Junagadh | 8469156465 |

Milk Society

| Contact Person | Designation | Address | Contact No |
|----------------|-------------|--------------|------------|
| ANAND | | | |
| Miteshbhai | Secr | Gana | 9913477489 |
| Ramanbhai | Secr | Ambav | 9998787278 |
| Shivabhai | Chairman | Gopalpura | 9824391429 |
| Sanjaybhai | Secr | Jitodiya | 9714345208 |
| Kiritbhai | Secr | Jol | 9879650030 |
| Harishbhai | Secr | Sandeshar | 9904845024 |
| Chandubhai | V.C. | Khadol | 2696284495 |
| Ishwarbhai | Secr | Jahangirpura | 2692266657 |
| Maheshbhai | Secr | Jakhariya | 9824628987 |
| Mahendrabhai | Secr | Adash | 2692284623 |
| Pradeepbhai | Secr | Bakrol | 9898817799 |
| Kantibhai | Secr | Mogari | 9924603501 |
| Harshadbhai | Secr | Karamsad | 9925932962 |
| Pradeepbhai | Secr | Vadod | 9033981501 |
| Kaushikbhai | Secr | Meghva | 9428648761 |
| Manubhai | Chairman | Boriya | 9904986789 |
| | | | |
| | | | |

SURENDRANAGAR

| | | | |
|---------------|----------|--------------|------------|
| Kantibhai | Secr | Memka | 9898418242 |
| Gopalbhai | Secr | Kariyani | 9099709916 |
| Ashokbhai | Secr | Kothariya | 9979699922 |
| Jivonbhai | Secr | Vaghela | 9429512159 |
| Vipulbhai | Secr | Bala | 9714642335 |
| Kishorbhai | Secr | Mulchand | 9925385466 |
| Bharatbhai | Secr | Rajpar | 9979634527 |
| Rameshbhai | Chairman | Limbdi (Pvt) | 9825284002 |
| Mohanbhai | Secr | Limbdi | 9879762021 |
| Selabhai | Secr | Baldara | 9913595628 |
| Nikunjibhai | Owner | Kharva (Pvt) | 9712427227 |
| Ghanshyambhai | Secr | Kharva | 9725327123 |
| Bhagwanbhai | Secr | Gomta | 9725105110 |
| Bhikabhai | Secr | Vadod | 9879757220 |
| kakubhai | Secr | Timba | 9998824670 |

GODHRA

| | | | |
|-------------|----------|-------------------------|------------|
| Madansingh | Chairman | Ambali | 9712503080 |
| Govindbhai | Secr | Vavdi | 9726543162 |
| Vallabhai | Secr | Rampura | 2672286659 |
| Pravinbhai | Chairman | Kankanpur | 9426250047 |
| Rameshbhai | Secr | Ratanpur | 9725141506 |
| Pravinbhai | Secr | Tuva | 9978173653 |
| Ramsingh | Secr | Bagidor | 8141188930 |
| Natubhai | Secr | Karsana (Chhakari) | 9979189939 |
| Vijaybhai | Secr | Motal | 8758365826 |
| Pratapbhai | Secr | Dhanitara | 9737246985 |
| Vikrambhai | Secr | Velvand | 9909732643 |
| Mukeshbhai | Secr | Padhiyar | 9427595628 |
| Shobhnaben | Secr | Nadisor (Mahila Mandli) | 9099136664 |
| Harishchand | Secr | Navi Dhari | 9924318969 |
| Ishwarbhai | Secr | Juni Dhari | 9825227611 |

JUNAGADH

| | | | |
|-----------|------|-----------|------------|
| Milanbhai | Secr | Koili | 9909806235 |
| Jetabhai | Secr | Dhandusar | 9925575094 |
| Munabhai | Secr | Vadhavi | 9879393376 |
| Hirabhai | Secr | Umatva | 9726514497 |
| Bhojabhai | Secr | Ambaliya | 9727211380 |
| Gopalbhai | Secr | Vadal | 9879476064 |

| | | | |
|--------------|------|--|------------|
| Damjibhai | Secr | Makhiyara | 9913509624 |
| Lalabhai | Secr | Patrapar | 9904171358 |
| Dilshukhbhai | Secr | Majevadi | 9825771609 |
| Rajubhai | Secr | Shapur | 9924236895 |
| Rajubhai | Secr | Thanapipli | 9924236895 |
| Rajubhai | GM | Girnar Dairy Food Dairy Pvt. Ltd. (12000 Ltrs) | 9428015482 |

AHMEDABAD

| | | | |
|-------------|----------|------------------|------------|
| bhikhbhai | Secr | aajaji ni muvadi | 9426029085 |
| rashikbhai | Secr | vadol | 9727746111 |
| mhotsibhai | Secr | bhatpura | 9727746113 |
| Sanjaybhai | Owner | odhav | 9898508990 |
| bhimshing | Secr | chavljaj | 9727746109 |
| ravjibhai | Secr | govinda | 9624588171 |
| gahajibhai | Member | virawatni | |
| bhemaji | Chairman | jaswant | |
| Somabhai | Secr | ranodara | 9724552169 |
| bhavinbhahi | Admin | chandel | 8140582661 |
| Jalapbbhai | Secr | kujad | 9727746112 |
| rameshbhai | Secr | khadi | 9725405392 |
| raijibhai | Secr | ranodara math | 9727746110 |
| gotaji | Secr | phulajini muvadi | 9601472357 |
| amratben | Secr | kaniyol | 9601464352 |

GANDHINAGAR

| | | | |
|-----------------|----------|-------------|------------|
| Anitbhai | Mantry | Sargasan | 9904316845 |
| thakor Ishwarji | Chairman | Sonipur | 9904449263 |
| Dineshbhai | Member | Ishanpur | 9904190976 |
| Gitaben | Chairman | Pethapur | 9624223763 |
| Kantibhai | Secr | Kolvada | 9924240287 |
| Bipin patel | Mantry | Vavol | 9427056957 |
| Suresh bhai | Clerk | new chiloda | 9723027177 |
| Lakhanji | Chairman | Uwarsad | |
| Viramji | Mantry | Moti Adaraj | 9924285589 |
| Nalinbhai | Member | Raysan | 9586752629 |
| Bharatbhai | Member | Chiloda | 9879484466 |
| Dhibrubhai | Mantry | Bhat | 9998360359 |
| Ganapat patel | Member | Ishanpur | 8140473061 |
| Manishbhai | Mantry | Rupal | 9824529182 |

MEHSANA

| | | | |
|------------|--------|------------|------------|
| vinodbhai | Mantra | randala | 9979315398 |
| N.c.chavda | Mantra | piludra | 9427545757 |
| kakuji | Mantra | vadu | 9687043283 |
| dineshbhai | Mantra | kansarakui | 9724341342 |
| yogeshbhai | Member | tavdiya | 9925612841 |

| | | | |
|--------------------|------------|--------------|---------------|
| Ragjibhai | Mantra | tavdiya | 291005 |
| govindbhai | Mantra | umta | 9428389682 |
| naranbhai | Mantra | hasanpur | 9429414124 |
| mohanbhai | Mantra | valam | 285784 |
| Jayantibhai | Mantra | sundhiya | 9099286468 |
| Galbaji | Mantra | aambavadi | 9712102621 |
| Prahladbhai | Mantra | rangpur | 9904625402 |
| tejaji | Mantra | bajpur | 9099669895 |
| cheharben | Member | tavdiya | 9726090192 |
| praveenbhai | Mantra | new pipalaj | 9924169161 |
| PALANPUR | | | |
| Shantibhai | Mantri | Sejalpur | 9978282886 |
| Narsigh bhai | Mantri | Semodra | 9723030042 |
| Devjibhai karen | Member | Lalawada | 8140975046 |
| Kantibhai | Mantri | Kotda | 9726748820 |
| Mogji bhai | Mantri | Gola | 9427650015 |
| Tribhovanbhai | Mantri | Jaspuriya | 9825409640 |
| Kurshibhai | Mantri | Godadpur | 9824992233 |
| Hirabhai | Mantri | Jethi | 9724389950 |
| Babubhai | Mantri | Hebatpura | 9427392426 |
| Chehrabih | Mantri | Chitrasani | 9099163585 |
| Murajbhai chudhari | Mantri | Mervada | 9904356556 |
| Gemarbhai | Mantri | Khemana | 9898831455 |
| Jayantibhai | Mantri | Pirojpura | 9978078761 |
| Bhikabhai | Mantri | Janjarva | 9428024781 |
| Hirabhai | Mantri | Ratanpur | 9429422094 |
| HIMMATNAGAR | | | |
| Jayantibhai | Chairman | Hajipur | 9427882762 |
| Rajubhai | Secretory | mota kotda | 9427949902 |
| Ramabhai | Secretory | Khed | 9427688800 |
| jivanbhai | Chairman | sakrodiya | 9727111427 |
| Rajubhai | Chairman | Chhadrada | 9727828257 |
| jayantibhai | Secretory | Aakodara | 9427339392 |
| Dhanvantbhai | Chairman | Nava | 9426390908 |
| Babubhai | Secretory | Kaniyol | 9427949998 |
| Bhagabhai | Secretory | Rampur | 256571/256044 |
| Bhikhushingh | Secretory | Roda | 9426897883 |
| Jayantibhai | Secretory | Jambudi | 9429835896 |
| manibhai | Radhaswami | desasan(pvt) | 9429475549 |
| manaharbhai | Secretory | thumra | 9909497002 |
| Kantibhai | Secretory | Kashipura | 9227364855 |
| Narsighbhai | Secretory | purul | 9428556454 |
| | | | |

| BARODA | | | |
|--------------------|----------|----------------|------------|
| Dimple Kumar Patel | Secr | Bhaili | 9727797872 |
| Keshav Bhai | Secr | Fatehpura | 9723202199 |
| Arvind Patel | Secr | Dabasa | 244013 |
| Suresh Patel | Chairman | Loona | 9925840183 |
| Ranjit Sinh | Secr | Khandera | 9925030118 |
| Bhupendra | Secr | Tazpura | 9328182644 |
| Ganpat Bhai | Secr | Raipura | 9904404216 |
| Rajnikant Bhai | Secr | Latipura | 9898396379 |
| Umaid Bhai | Secr | Lakdikui | 8140947929 |
| Vitthal Bhai | Secr | Harshadpur | |
| Jaimal Sinh | Secr | Dajipura | |
| Arvind Bhai | Secr | Ganpatpur | 9723862711 |
| Hitesh Bhai | Secr | Sangma | 9427315677 |
| VALSAD | | | |
| Dahya Bhai | Secr | D F Dungri | 9724007745 |
| Anil Kumar | Secr | B Kundi | 9974613235 |
| Pragnesh Bhai | Testing | A F Sigvi | 9586062378 |
| Daksha Ben | Secr | A F Milk Co. | 9904551001 |
| Kairavi Desai | Secr | Desai Faliya | 232064 |
| Deepa Patel | Secr | Parnera Pardi | 9723919497 |
| Ramdev Bhai | Secr | Valiya Faliya | 9978785653 |
| Jasuben | Secr | Nani Sarona | 9601467641 |
| Manisha Patel | Secr | Sarodhi | 9913907781 |
| Prafula Ben | Secr | Kanpri | 9601467640 |
| Saroj Nayak | Secr | Jalaram Ghadoi | 9712052141 |
| Hemant Bhai | Secr | | 9979495710 |
| Mahesh Kumar | Secr | R F Dungri | 9979576330 |
| Bhavini Ben | Secr | | 9979349983 |
| SURAT | | | |
| Kamlesh Patel | Secr | Viyara | 225324 |
| Chetan Gamit | Secr | Indu | 9978332350 |
| Bhuvan Bhai | Chairman | Chikhalvav | 9925685343 |
| Sunil Gamit | Secr | Chanpavadi | 9725298635 |
| Kantilal Gamit | Secr | Unchamala | 9909678191 |
| Lalsinh Bhai | Secr | Bedkua | 9978257293 |
| Mahesh Gamit | Secr | Lakhali | 9712780947 |
| Kamlesh Bhai | Chairman | Katarfaliy | |
| Prakash Gamit | Chairman | Nani Chikhli | 9998791823 |
| Suman Gamit | Secr | Tadkua | 9879773432 |
| Khushiram Bhai | Secr | Bedkua | 9726287458 |
| Bagubhai | Chairman | Tichakia | 9825053022 |
| | | | |

| BHARUCH | | | |
|----------------|----------|----------|------------|
| Piyush Patel | Secr | Samni | 9913558560 |
| Bhupendra Sinh | Secr | Kelod | 9737396793 |
| Arunoday Bhat | Secr | Keslu | 9825573558 |
| Esmail Ishad | Chairman | Kurchan | 9737864844 |
| Jaswant Patel | Secr | Simartha | 7874994070 |
| Mohan Solanki | Secr | Anor | 9426860392 |
| Ghanshyam Sinh | Secr | Tancha | 9726709601 |
| Ganpat Sinh | Secr | Ghamnad | 8980159960 |
| Balwant Patel | Secr | Pipaliya | 284502 |
| Rikesh Patel | Secr | Tralsa | 8980243111 |

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